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ABSTRACT

Developed in Virginia, this publication contains task analysis guides to support selected tech prep programs that prepare students for careers in the business and marketing cluster. Guides are included for accounting systems, legal systems administration, office systems technology, and retail marketing. Each task analyses guide has the following essential elements: (1) an occupational task list derived from a panel of local workers or employers (occupational analysis) consisting of a duty area, a task or competency, a performance objective, a performance measure, and enabling objectives and activities; (2) a collection of secondary and postsecondary instructional objectives and performance measures that reflect the occupational analysis; (3) a list of courses and programs that make up the tech prep program; and (4) a list of resources that can be used to support instruction. (KC)

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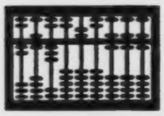
ED 406 540

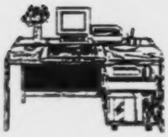
TASK ANALYSES

BUSINESS AND MARKETING CLUSTER



ACCOUNTING SYSTEMS

LEGAL SYSTEMS



OFFICE SYSTEMS TECHNOLOGY

GOING
INTO
BUSINESS
SALE

RETAIL MARKETING

CE 073 766

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TASK ANALYSES
BUSINESS AND MARKETING CLUSTER

DEVELOPED BY

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INTRODUCTION

This publication contains task analyses guides to support selected Tech Prep programs that prepare students for careers in the Business and Marketing cluster.

Tech Prep curriculum guides are essentially local products, developed to support programs offered by a community college and the school divisions in its consortium. Each guide is intended to serve as a model for other sites that wish to establish a similar program, and for this reason, all deliverables as they are received are placed in the library of the Virginia Vocational Curriculum and Resource Center (VVCRC), available on loan. A few have been selected for publication and broader distribution by the Virginia Community College System, based on their potential for widespread use.

Each task analyses guide included in this publication has the following essential elements:

- An occupational task list derived from a panel of local workers or employers (occupational analysis)
- A collection of secondary and postsecondary instructional objectives and performance measures that reflect the occupational analysis
- A list of courses and programs that make up the Tech Prep program
- A list of resources that can be used to support instruction.

Certain other elements, such as related academic competencies and career path information, have been included if developed by the local site. Other information, including learning activities, sample student schedules, course descriptions, and other introductory matter, may be obtained from the complete guide in the VVCRC library or from the project director.

Each task analyses guide has been reviewed and approved for statewide use in secondary schools by the appropriate content specialist at the Virginia Department of Education. Due to recent restructuring of many secondary program areas, the content of a Tech Prep guide, based on local employment requirements, may differ from the VDOE-recommended course content. Suggestions by the content specialist to reconcile these differences may be noted in the guide.

ACCOUNTING SYSTEMS

Developed by the Tidewater Area Tech Prep Consortium

Tidewater Community College
Chesapeake Public Schools
Norfolk Public Schools
Portsmouth Public Schools
Virginia Beach Public Schools

Dr. Maxine B. Singleton, Project Director

Edited and produced by
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1996

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OCCUPATIONAL ANALYSIS

Occupational Task List, Accounting Technician/Accounting Assistant

A. PERFORMING GENERAL ACCOUNTING FUNCTIONS
   1. Perform bank account reconciliations.
   2. Prepare reconciliations and analyses.
   3. Maintain fixed assets records.
   4. Process end-of-period information.
   5. Prepare, process, maintain, and balance financial ledgers.

B. PROCESSING PURCHASES AND PAYABLES
   1. Process requisitions and or purchase orders.
   2. Process other payables.
   3. Prepare reconciliations and analyses related to purchases and payables.
   4. Prepare sales tax exemption certificates.
   5. Process purchase invoices.
   6. Process payments.
   7. Respond to vendor inquiries.
   8. Process purchase returns and allowances.
   9. Generate ledgers related to purchases and payables.
   10. Prepare end-of-period accrual information.

C. PROCESSING SALES AND RECEIVABLES
   1. Process sales invoices.
   2. Attempt to collect past-due accounts.
   3. Obtain sales tax exemption certificates.
   4. Generate and maintain customer list.
   5. Process/post receipts.
   6. Generate ledgers related to sales and receivables.
   7. Prepare uncollectible accounts analyses.
   8. Process sales returns and allowances.
   9. Prepare reconciliations and analyses related to sales and receivables.
   10. Respond to customer inquiries.

D. PERFORMING PETTY CASH FUNCTIONS
   1. Reconcile and reimburse petty cash funds.
   2. Prepare reconciliations and analyses related to petty cash.
   3. Prepare petty cash vouchers and supporting documentation.

E. PERFORMING MANAGERIAL ACCOUNTING
   1. Process cost accounting information.
   2. Perform profitability analyses.
   3. Process budget information.
   4. Perform business/financial analyses.
   5. Perform forecasting.
   6. Prepare budget-to-actual comparisons.

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F. PROCESSING PAYROLL AND RELATED RECORDS
   1. Maintain employee payroll records.
   2. Process payroll.
   3. Respond to employee inquiries regarding payroll.
   4. Process payroll benefits information.
   5. Prepare reconciliations and analyses related to payroll and employee/employer records.
   6. Prepare external information reports.
   7. Process employee withholding information.
   8. Generate ledgers/reports related to payroll and employee/employer records.

G. PERFORMING AUDITING FUNCTIONS
   1. Collect and summarize data for external auditors.
   2. Observe inventory count.
   3. Prepare financial reports.
   4. Process confirmation letters.
   5. Select statistical samples.
   6. Prepare reconciliations and analyses.
   7. Assist external auditors.
   8. Document internal controls.

H. COMMUNICATING WITH OTHERS
   1. Perform internal/external client service functions.
   2. Conduct training.
   3. Prepare and deliver oral presentations.
   4. Answer phone and record messages.
   5. Compose written documents.

I. MAINTAINING PROFESSIONALISM
   1. Maintain professional conduct.
   2. Participate in community activities.
   3. Participate in continuing education.
   4. Participate in team projects.
   5. Establish personal professional development goals.

J. RECORDING INVENTORY
   1. Verify inventory quantities.
   2. Prepare inventory reconciliation analyses.
   3. Maintain inventory records.
   4. Process inventory.

K. USING OFFICE TECHNOLOGY
   1. Communicate through electronic means.
   2. Perform database functions.
   3. Maintain hardware operations.
   4. Perform word processing functions.
   5. Perform spreadsheet functions.
   6. Perform automated accounting functions.
   7. Operate and maintain office equipment.

L. PERFORMING GENERAL OFFICE FUNCTIONS
   1. Plan and organize work flow (prioritize).
   2. Research information.
   3. Maintain filing system.
   4. Retrieve documents.
   5. File documents.
   6. Maintain office supplies.

M. PERFORMING TAX FUNCTIONS
   1. Collect tax data.
   2. Prepare tax reports.
   3. Prepare federal and state income tax returns.
   4. Summarize tax data electronically or manuallly.
   5. Process payroll tax returns.
   6. Prepare information returns.
   7. Prepare personal property tax returns.
   8. Prepare sales tax returns.

ACCOUNTING TECHNICIAN

Equipment List

- Check encoder
- Checkwriter
- Copier
- CRT terminal
- Dictation equipment
- Fax machine
- Local area network
- Mailing equipment
- Microfiche equipment
- Modem
- Optical scanner
- Personal computer, printer, and peripherals
- Report binding equipment
- Telephone
- Ten-key calculator
- Typewriter
- Voice mail

Software

- Accounting packages:
  - Peachtree
  - DacEasy

DOS
E-mail software
Excel
Lotus 1-2-3
Microsoft Works
Microsoft Word
OCR software
Quattro Pro
Windows
WordPerfect
Utilities software (i.e., Norton, Procomm)

KNOWLEDGE, SKILLS, AND APTITUDES

Accounting principles (including debits, credits, cash flow, double-entry bookkeeping, balance sheet, and chart of accounts)
Basic English
Basic math (including formulas)
Business writing
Computer literacy
Communication skills (including oral communication)
Employability skills (interviewing, resume, image, etiquette)
Financial management
Interpersonal relationships
Logic, problem solving, analyses, and decision making
Personal (self-esteem, attitude, willingness to learn, work ethic)
Tax concepts

RECOMMENDED RELATED COURSES

Algebra
Business Ethics
Business Law
Business Statistics
General Business
Introduction to Computers (basic programming)
Keyboarding/Typing
Applied Work Experience (summer, co-op, internships, shadowing)

CAREER PATH OFFERINGS FOR SELECTED ACCOUNTING OCCUPATIONS

HIGH SCHOOL	**CAREER STUDIES (Postsecondary)**	**CERTIFICATE (Postsecondary)**	**ASSOCIATE DEGREE (Postsecondary)**
Accounting Clerk	Accounts Receivable Clerk	Bookkeeper	Junior Accountant
Bank Teller	Accounts Payable Clerk	Tax Preparer	Internal Auditor Trainee
	Cost Clerk	Management Trainee	Bank Management Trainee
	Payroll Clerk		Accounting Technician
			Administrative Assistant
			Accounting Trainee

RELATED ACADEMIC COMPETENCIES

DUTY AREA 1. ORIENTING THE STUDENT

1.1 Identify course requirements/expectations.
1.2 Participate in co-curricular organization.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	1.1, 1.2
• Read with comprehension.	1.1, 1.2
• Demonstrate both pre-planned and spontaneous speaking.	1.1, 1.2
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	1.1, 1.2
• Demonstrate teamwork and group problem-solving techniques.	
• Interpret technical information.	
• Demonstrate a sense of responsibility for participating in discussions.	
• Take notes from written, oral, and audiovisual materials.	1.1, 1.2
• Write, revise, edit, proofread, and document papers.	1.1, 1.2
• Demonstrate tolerance and respect for individual differences.	
• Give oral and written directions.	
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	1.1
• Follow multistep oral and written instructions.	
• Communicate ideas and feelings through creative activities.	
• Maintain vocabulary and reading skills to prepare for successive materials being taught.	1.1
• Complete forms with accuracy.	
• Ask questions necessary to gain information.	1.2
• Develop oral and written solutions to problems.	

*Based on locally derived occupational information

DUTY AREA
1. ORIENTING THE STUDENT

COURSE
Accounting (6320)
Accounting (6613)

TASK/COMPETENCY
1.1 Identify course requirements/expectations.

PERFORMANCE OBJECTIVE
P1.1 Given instruction and guidelines, identify course requirements/expectations by completing an assignment sheet according to directions. Identification should include review of text, syllabus, objectives, and classroom policies and should match instructor checklist.

PERFORMANCE MEASURE
M1.1 Written list of requirements/expectations; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Review the text, course syllabus, and course objectives.
2. Review tasks/competencies to be taught in the course.
3. Explain class rules, school policies, and safety.
4. Explain grading procedures, honor code requirements, course requirements, and any fees required.
5. Explain student and teacher responsibilities.
6. Stress the importance of attendance.

DUTY AREA
1. ORIENTING THE STUDENT

COURSE
Accounting (6320)
Accounting (6613)

TASK/COMPETENCY
1.2 Participate in co-curricuar organization.

PERFORMANCE OBJECTIVE
P1.2 Given guidelines and information, participate in co-curricular organization. Include use of parliamentary procedure, knowledge of the structure of the local, state, and national organization, and of the FBLA. Participation should be based on instructor guidelines.

PERFORMANCE MEASURE
M1.2 Oral report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the purpose and function of FBLA.
2. Recite the FBLA pledge and goals.
3. Describe the FBLA emblem.
4. Demonstrate proper use of parliamentary procedures.
5. State the structure of the local, state, and national organizations.
6. Review the FBLA State Handbook.
7. Participate in FBLA competitive events.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 2. GETTING AN ACCOUNTING JOB

2.1 Identify job opportunities in the accounting field.
2.2 Develop a resume.
2.3 Compose a letter of application.
2.4 Complete a job application form.
2.5 Demonstrate job interview skills.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	2.1, 2.4
• Read with comprehension.	2.2
• Demonstrate both pre-planned and spontaneous speaking.	2.1, 2.5
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	
• Demonstrate teamwork and group problem-solving techniques.	2.4
• Interpret technical information.	2.2, 2.5
• Demonstrate a sense of responsibility for participating in discussions.	2.1, 2.4
• Take notes from written, oral, and audiovisual materials.	2.1, 2.3
• Write, revise, edit, proofread, and document papers.	2.3
• Demonstrate tolerance and respect for individual differences.	2.4
• Give clear oral and written directions.	2.1, 2.5
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	2.4
• Follow multistep oral and written instructions.	2.1, 2.2, 2.4, 2.5
• Communicate ideas and feelings through creative activities.	2.1, 2.2
• Maintain vocabulary and reading skills to prepare for successive materials being taught.	
• Complete forms with accuracy.	2.1, 2.3
• Ask questions necessary to gain information.	2.1
• Develop oral and written solutions to problems.	2.4

*Based on locally derived occupational information

DUTY AREA
2. GETTING AN ACCOUNTING JOB

COURSE
Accounting (6613)

TASK/COMPETENCY
2.1 Identify job opportunities in the accounting field.

PERFORMANCE OBJECTIVE
P2.1 Given sources of information, identify job opportunities in the accounting field, using at least three of the sources listed. Identification should be made according to instructor specifications.

PERFORMANCE MEASURE
M2.1 Oral report to class; rated acceptable according to instructor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain entry-level employment.
2. Give examples of entry-level jobs in the field of accounting and the major skills needed for each.
3. List the kinds of job information available through the Virginia Employment Commission and state the location of the local office.
4. Explain how private employment agencies differ from public employment agencies.
5. Explain the arrangement of employment ads in the local newspaper and interpret selected accounting related want ads.
6. Compare the advantages and disadvantages of direct employer contact when seeking employment in accounting.
7. Identify types of personal contacts that may be valuable when seeking employment.
8. Explain how participation in co-curricular and extra-curricular student organizations may contribute to one's chances of getting a job.
9. List examples of accounting jobs to which one may be promoted and for which additional education may be required.
10. Explain accounting as a career.

DUTY AREA
2. GETTING AN ACCOUNTING JOB

COURSE
Accounting (6613)

TASK/COMPETENCY
2.2 Develop a resume.

PERFORMANCE OBJECTIVE
P2.2 Given information on the types and purposes of a resume, develop a resume stating qualifications for a job in the accounting field. The resume must be typed and contain no errors. Resume must be developed according to instructor specifications.

PERFORMANCE MEASURE
M2.2 Resume completed; rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the types and purposes of a resume.
2. Determine information to be included on a resume and the order in which it appears.
3. List skills learned in the accounting program in terms of job qualifications.
4. Explain rules involving references on resumes or application forms.
5. Compare different examples of resumes.

DUTY AREA
2. GETTING AN ACCOUNTING JOB

COURSE
Accounting (6613)

TASK/COMPETENCY
2.3 Compose a letter of application.

PERFORMANCE OBJECTIVE
P2.3 Given information concerning a job opportunity in accounting, compose a letter of application to accompany a resume. The letter must be composed according to instructor checklist.

PERFORMANCE MEASURE
M2.3 A letter of application; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of a job application.
2. Identify rules for the appearance of a letter of application.
3. Identify rules for the content of a letter of application.
4. Identify the components of a business letter.
5. Explain acceptable formats for business letters.

DUTY AREA
2. GETTING AN ACCOUNTING JOB

COURSE
Accounting (6613)

TASK/COMPETENCY
2.4 Complete a job application form.

PERFORMANCE OBJECTIVE
P2.4 Given a sample job application form and a personal resume, complete a job application form according to its instructions. Application must be completed according to instructor guidelines.

PERFORMANCE MEASURE
M2.4 Sample job application form; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define terms related to application form.
2. List information asked for in typical application forms.
3. Identify uses by the employer for application forms.
4. Explain instructions for completing application forms.
5. Explain the importance of neatness and completeness when filling out an application form.

DUTY AREA
2. GETTING AN ACCOUNTING JOB

COURSE
Accounting (6613)

TASK/COMPETENCY
2.5 Demonstrate job interview skills.

PERFORMANCE OBJECTIVE
P2.5 Given instruction on the appropriate behavior for job interviews, demonstrate job interview skills. Skills must be demonstrated according to instructor checklist.

PERFORMANCE MEASURE
M2.5 Role-play job interview; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain procedures in preparing for a job interview.
2. State the purposes of a job interview.
3. Interpret questions the interviewer might ask an accounting job applicant.
4. Identify questions the accounting job applicant may need to ask the interviewer.
5. State the purpose of a follow-up letter.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 3. MAINTAINING PROFESSIONALISM

3.1 Maintain professional conduct.
3.2 Participate in community activities.
3.3 Participate in team projects.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	3.1, 3.2, 3.3
• Read with comprehension.	3.1, 3.2, 3.3
• Demonstrate both pre-planned and spontaneous speaking.	3.1, 3.2, 3.3
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	3.1, 3.2, 3.3
• Demonstrate teamwork and group problem-solving techniques.	
• Interpret technical information	3.1, 3.2, 3.3
• Demonstrate a sense of responsibility for participating in discussions.	3.1, 3.2, 3.3
• Take notes from written, oral, and audiovisual materials.	3.1, 3.2
• Write, revise, edit, proofread, and document papers.	
• Demonstrate tolerance and respect for individual differences.	
• Give clear oral and written directions.	3.1, 3.2, 3.3
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	
• Follow multistep oral and written instructions.	3.1, 3.2
• Communicate ideas and feelings through creative activities.	
• Maintain vocabulary and reading skills to prepare for successive materials being taught.	3.1, 3.2, 3.3
• Complete forms with accuracy.	3.1, 3.2
• Ask questions necessary to gain information.	3.1, 3.2, 3.3
• Develop oral and written solutions to problems.	3.2

*Based on locally derived occupational information

DUTY AREA
3. MAINTAINING PROFESSIONALISM

COURSE
Accounting (6613)

TASK/COMPETENCY
3.1 Maintain professional conduct.

PERFORMANCE OBJECTIVE
P3.1 Given a checklist of 10 characteristics that employers and co-workers may value (such as dependability, honesty, tact, confidentiality, cooperativeness, good personal grooming, and good judgment), maintain professional conduct according to instructor guidelines.

PERFORMANCE MEASURE
M3.1 Checklist identification; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Invite an accountant to speak to class about job conduct.
2. Identify characteristics and benefits of being a professional.
3. Define *tact, confidentiality,* and *judgment.*
4. List benefits of being professional when working on a job.

DUTY AREA
3. MAINTAINING PROFESSIONALISM

COURSE
Accounting (6613)

TASK/COMPETENCY
3.2 Participate in community activities.

PERFORMANCE OBJECTIVE
P3.2 Given Future Business Leaders of America (FBLA) guidelines for community service projects, participate in community activities. Participation must take place according to organization/instructor guidelines.

PERFORMANCE MEASURE
M3.2 Student participation in one community service project; instructor approved and evaluated according to organization/instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify community organizations and their functions.
2. Explain how one can join or participate in these organizations.
3. Explain benefits to the community and participant of engaging in community activities.

DUTY AREA
3. MAINTAINING PROFESSIONALISM

COURSE
Accounting (6613)

TASK/COMPETENCY
3.3 Participate in team projects.

PERFORMANCE OBJECTIVE
P3.3 Given a situation and assignment to a group, participate in team projects. Participation must take place according to a checklist based on instructional guidelines.

PERFORMANCE MEASURE
M3.3 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Assign the project to the group and explain how it is to be carried out.
2. Explain the role of each person in the group.
3. Illustrate the checklist that will be used to rate the participation of each group member.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 4. PERFORMING GENERAL ACCOUNTING FUNCTIONS

4.1 Prepare a bank statement reconciliation.
4.2 Maintain fixed asset records.
4.3 Journalize business transactions and post entries to general and subsidiary ledgers.
4.4 Complete a work sheet with adjustments.
4.5 Prepare an income statement and a balance sheet.
4.6 Establish and replenish a petty cash fund.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	4.1, 4.2, 4.3, 4.4, 4.5, 4.6
• Read with comprehension.	4.1, 4.2, 4.3, 4.4, 4.5, 4.6
• Demonstrate both pre-planned and spontaneous speaking.	4.1, 4.2, 4.3, 4.4, 4.5, 4.6
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	
• Demonstrate teamwork and group problem-solving techniques.	
• Interpret technical information.	4.1, 4.2, 4.3, 4.4, 4.5
• Demonstrate a sense of responsibility for participating in discussions.	4.4, 4.5
• Take notes from written, oral, and audiovisual materials.	
• Write, revise, edit, proofread, and document papers.	
• Demonstrate tolerance and respect for individual differences.	
• Give clear oral and written directions.	4.1, 4.2, 4.3, 4.4, 4.5
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	4.4, 4.5
• Follow multistep oral and written instructions.	4.1, 4.2, 4.3
• Communicate ideas and feelings through creative activities.	
• Maintain vocabulary reading skills to prepare for successive materials being taught.	4.1, 4.2, 4.3, 4.4, 4.5, 4.6
• Complete forms with accuracy.	4.1, 4.2, 4.3, 4.4, 4.5
• Ask questions necessary to gain information.	4.1, 4.2, 4.3, 4.4, 4.5, 4.6
• Develop oral and written solutions to problems.	

*Based on locally derived occupational information

DUTY AREA | **COURSE**
4. PERFORMING GENERAL ACCOUNTING FUNCTIONS | Accounting (6320)

TASK/COMPETENCY

4.1 Prepare a bank statement reconciliation.

PERFORMANCE OBJECTIVE

P4.1 Given procedure for reconciliation, a bank statement, and necessary data, prepare a bank statement reconciliation with 100% accuracy. Statement should reflect knowledge of terms, concepts, practices, and business forms as well as ability to journalize transactions.

PERFORMANCE MEASURE

M4.1 Bank statement reconciliation; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms related to checking accounts.
2. Explain concepts and practices related to checking accounts.
3. Prepare checks and business forms related to a checking account.
4. Explain procedures for reconciling bank statement with check register.
5. Journalize transactions related to a checking account.

DUTY AREA | **COURSE**
4. PERFORMING GENERAL ACCOUNTING FUNCTIONS | Accounting (6320)

TASK/COMPETENCY

4.2 Maintain fixed asset records.

PERFORMANCE OBJECTIVE

P4.2 Given necessary data and forms, maintain fixed asset records by recording depreciation expense and book value with 100% accuracy.

PERFORMANCE MEASURE

M4.2 Fixed asset record; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify concepts and practices related to depreciation and fixed assets.
2. Calculate depreciation expense and book value for fixed assets.
3. Prepare fixed asset records.
4. Journalize entries related to fixed assets and depreciation.

DUTY AREA
4. PERFORMING GENERAL ACCOUNTING FUNCTIONS

COURSE
Accounting (6320)

TASK/COMPETENCY
4.3 Journalize business transactions and post entries to general and subsidiary ledgers.

PERFORMANCE OBJECTIVE
P4.3 Given selected business transactions, journals, and ledgers, journalize business transactions and post entries to general and subsidiary ledgers with100% accuracy. A trial balance must be taken to prove the equality of debits and credits.

PERFORMANCE MEASURE
M4.3 Journalized transactions and posted entries; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Journalize business transactions in appropriate journal.
2. Post from the journal's general amount columns.
3. Post from the journal's special amount columns.
4. Prove cash.
5. Prove the equality of debits and credits in the general ledger.
6. Prepare subsidiary schedules.
7. Compare each schedule total with the balance of the general ledger controlling account.

DUTY AREA
4. PERFORMING GENERAL ACCOUNTING FUNCTIONS

COURSE
Accounting (6320)

TASK/COMPETENCY
4.4 Complete a work sheet with adjustments.

PERFORMANCE OBJECTIVE
P4.4 Given steps for preparing a work sheet, general ledger, and adjustment figures, complete a work sheet with adjustments with 100% accuracy by following the steps given (record adjustments, extend balances, and total columns).

PERFORMANCE MEASURE
M4.4 Eight-column work sheet; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Record the trial balance.
2. Record the adjustments.
3. Extend all balance sheet account balances after adjustments.
4. Extend all income statement account balances after adjustments.
5. Figure and record the net income or loss.
6. Total and rule the columns.

DUTY AREA
4. PERFORMING GENERAL ACCOUNTING FUNCTIONS

COURSE
Accounting (6320)

TASK/COMPETENCY
4.5 Prepare an income statement and a balance sheet.

PERFORMANCE OBJECTIVE
P4.5 Given instructions and a completed work sheet, prepare an income statement and a balance sheet with 100% accuracy.

PERFORMANCE MEASURE
M4.5 Student-prepared income statement and balance sheet; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare the income statement revenue section.
2. Prepare the income statement expense section.
3. Figure net income or net loss on the income statement.
4. Prepare the balance sheet assets section.
5. Prepare the balance sheet liabilities section.
6. Compute the ending capital balance.
7. Prepare the balance sheet capital section.
8. Rule the financial statements.

DUTY AREA
4. PERFORMING GENERAL ACCOUNTING FUNCTIONS

COURSE
Accounting (6320)

TASK/COMPETENCY
4.6 Establish and replenish a petty cash fund.

PERFORMANCE OBJECTIVE
P4.6 Given necessary data and proper forms, establish and replenish a petty cash fund, using a cash payments journal. Procedures must be performed with 100% accuracy.

PERFORMANCE MEASURE
M4.6 Petty cash transactions; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define terms related to a petty cash fund.
2. Establish a petty cash fund, using a voucher system.
3. Record petty cash fund payments in a petty cash record.
4. Prepare a voucher to replenish a petty cash fund.
5. Determine if a petty cash fund is short or over.
6. Journalize necessary transactions related to establishing and replenishing petty cash.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 5. PROCESSING PURCHASES, PAYABLES, SALES, AND RECEIVABLES

5.1 Journalize purchases and cash payments transactions.
5.2 Post journal entries to general and accounts payable ledgers.
5.3 Journalize sales and cash receipts transactions.
5.4 Post journal entries to general and accounts receivable ledgers.
5.5 Estimate and journalize uncollectible accounts.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	5.1, 5.3
• Read with comprehension.	5.1, 5.3
• Demonstrate both pre-planned and spontaneous speaking.	5.1, 5.3
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	5.1
• Demonstrate teamwork and group problem-solving techniques.	
• Interpret technical information.	5.3
• Demonstrate a sense of responsibility for participating in discussions.	5.3
• Take notes from written, oral, and audiovisual materials.	
• Write, revise, edit, proofread, and document papers.	
• Demonstrate tolerance and respect for individual differences.	
• Give clear oral and written directions.	5.3
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	
• Follow multistep oral and written instructions.	5.1, 5.3
• Communicate ideas and feelings through creative activities.	
• Maintain vocabulary reading skills to prepare for successive materials being taught.	5.1, 5.3
• Complete forms with accuracy.	
• Ask questions necessary to gain information.	5.1, 5.3
• Develop oral and written solutions to problems.	

*Based on locally derived occupational information

DUTY AREA
5. PROCESSING PURCHASES, PAYABLES, SALES AND RECEIVABLES

COURSE
Accounting (6320)

TASK/COMPETENCY
5.1 Journalize purchases and cash payments transactions.

PERFORMANCE OBJECTIVE
P5.1 Given journals, transactions involving purchase invoices, returns and allowances, payments, and discounts, journalize purchases and cash payment transactions according to instructor guidelines.

PERFORMANCE MEASURE
M5.1 Recorded transactions; rated average or above according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms related to purchases and cash payments.
2. Identify and process invoices, debit memoranda, checks, and selected forms.
3. Analyze purchases and cash payments transactions.
4. Journalize purchases and cash payments transactions.
5. Prove the journal.

DUTY AREA
5. PROCESSING PURCHASES, PAYABLES, SALES, AND RECEIVABLES

COURSE
Accounting (6320)

TASK/COMPETENCY
5.2 Post journal entries to general and accounts payable ledgers.

PERFORMANCE OBJECTIVE
P5.2 Given ledgers and completed journals, post journal entries to general and accounts payable ledgers with 100% accuracy. A trial balance must be taken to prove equality of debits and credits by opening, posting, preparing, and comparing.

PERFORMANCE MEASURE
M5.2 Posted entries; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Open accounts in general ledger.
2. Open vendor accounts in accounts payable ledger.
3. Post journal to general ledger accounts.
4. Post journal entries to vendors accounts in accounts payable ledger.
5. Prepare a trial balance.
6. Prepare subsidiary schedule.
7. Compare schedule total with controlling account in general ledger.

DUTY AREA
5. PROCESSING PURCHASES, PAYABLES, SALES AND RECEIVABLES

COURSE
Accounting (6320)

TASK/COMPETENCY
5.3 Journalize sales and cash receipts transactions.

PERFORMANCE OBJECTIVE
P5.3 Given journals and transactions, journalize sales and cash receipts transactions according to instructor guidelines.

PERFORMANCE MEASURE
M5.3 Recorded transactions; average or above rating according to criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define terms related to sales and cash receipts.
2. Identify and process sales invoices, credit memoranda, receipts, and selected forms.
3. Calculate sales tax.
4. Analyze sales and cash receipts transactions.
5. Journalize sales and cash receipts transactions.
6. Prove the journal.

DUTY AREA
5. PROCESSING PURCHASES, PAYABLES, SALES AND RECEIVABLES

COURSE
Accounting (6320)

TASK/COMPETENCY
5.4 Post journal entries to general and accounts receivable ledgers.

PERFORMANCE OBJECTIVE
P5.4 Given ledgers and completed journals, post journal entries to general and accounts receivable ledgers with 100% accuracy. A trial balance must be taken to prove equality of debits and credits.

PERFORMANCE MEASURE
M5.4 Posted entries; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Open accounts in general ledger.
2. Open customer accounts in accounts receivable ledger.
3. Post journal to general ledger accounts.
4. Post journal entries to customer accounts in accounts receivable ledger.
5. Prepare trial balance.
6. Prepare subsidiary schedule.
7. Compare schedule total with controlling account in general ledger.

DUTY AREA
5. PROCESSING PURCHASES, PAYABLES, SALES, AND RECEIVABLES

COURSE
Accounting (6320)

TASK/COMPETENCY
5.5 Estimate and journalize uncollectible accounts.

PERFORMANCE OBJECTIVE
P5.5 Given necessary information and chosen method, estimate (by using a percentage of net sales, sales on account, and accounts receivable), and journalize uncollectible accounts. Accounts must be journalized according to instructor guidelines.

PERFORMANCE MEASURE
M5.5 Journal entries; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify concepts and practices related to uncollectible accounts.
2. Calculate estimated uncollectible accounts expense by using a percentage of net sales, sales on account, and accounts receivable.
3. Calculate estimated uncollectible accounts expense by aging accounts receivable.
4. Analyze and journalize entries related to uncollectible accounts.
5. Calculate and analyze accounts receivable turnover ratios.

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RELATED ACADEMIC COMPETENCIES

DUTY AREA 6. PERFORMING MANAGERIAL ACCOUNTING

6.1 Demonstrate cost accounting procedures for a general manufacturing business with emphasis on job-order costing system.
6.2 Identify management accounting procedures for inventory planning and valuations.
6.3 Demonstrate procedures for budgetary planning and control.
6.4 Analyze accounting information for management decisions.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	6.1, 6.2, 6.3, 6.4
• Read with comprehension.	6.1, 6.2, 6.3, 6.4
• Demonstrate both pre-planned and spontaneous speaking.	6.1, 6.2, 6.3, 6.4
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	6.1, 6.2, 6.3, 6.4
• Demonstrate teamwork and group problem-solving techniques.	
• Interpret technical information.	6.1, 6.2, 6.3, 6.4
• Demonstrate a sense of responsibility for participating in discussions.	
• Take notes from written, oral, and audiovisual materials.	6.3
• Write, revise, edit, proofread, and document papers.	6.1, 6.3
• Demonstrate tolerance and respect for individual differences.	6.2
• Give clear oral and written directions.	6.1, 6.2, 6.3, 6.4
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	6.1, 6.2, 6.3, 6.4
• Follow multistep oral and written instructions.	6.1, 6.2, 6.3, 6.4
• Communicate ideas and feelings through creative activities.	
• Maintain vocabulary reading skills to prepare for successive materials being taught.	6.1, 6.2, 6.3, 6.4
• Complete forms with accuracy.	
• Ask questions necessary to gain information.	6.1, 6.2, 6.3, 6.4
• Develop oral and written solutions to problems.	6.1

*Based on locally derived occupational information

DUTY AREA
6. PERFORMING MANAGERIAL ACCOUNTING

COURSE
Accounting (6613)

TASK/COMPETENCY
6.1 Demonstrate cost accounting procedures for a general manufacturing business with emphasis on job-order costing system.

PERFORMANCE OBJECTIVE
P6.1 Given the necessary working papers, demonstrate cost accounting procedures for a general manufacturing business with emphasis on job-order costing system. Demonstration must include identifying the elements of manufacturing costs, the flow of costs, recording the entries, and preparing ledger and cost sheets, and should be done according to instructor guidelines.

PERFORMANCE MEASURE
M6.1 End-of-fiscal-period financial statements; statement rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify elements of manufacturing costs.
2. Identify the flow of costs through the manufacturing process.
3. Record entries related to cost records for a manufacturing business.
4. Prepare ledger and cost sheets for a manufacturing business.

DUTY AREA
6. PERFORMING MANAGERIAL ACCOUNTING

COURSE
Accounting (6613)

TASK/COMPETENCY
6.2 Identify management accounting procedures for inventory planning and valuations.

PERFORMANCE OBJECTIVE
P6.2 Given information on merchandise inventory, identify management accounting procedures for inventory planning and valuations. Identification must be performed according to instructor guidelines, with a minimum of 80% accuracy.

PERFORMANCE MEASURE
M6.2 Management accounting procedures list; a minimum of 80% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Value a merchandise inventory, using selected cost methods.
2. Estimate a merchandise inventory, using selected estimating methods.
3. Figure merchandise inventory turnover ratio, and average number of day's sales in merchandise inventory.

DUTY AREA
6. PERFORMING MANAGERIAL ACCOUNTING

COURSE
Accounting (6613)

TASK/COMPETENCY
6.3 Demonstrate procedures for budgetary planning and control.

PERFORMANCE OBJECTIVE
P6.3 Given necessary data and proper forms, demonstrate procedures for budgetary planning and control by preparing a budgeted income statement and cash budget with 100% accuracy.

PERFORMANCE MEASURE
M6.3 Budgeted income statement and cash budget; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify concepts and practices related to preparing and analyzing budgeted income statements and cash budgets.
2. Prepare a budgeted income statement.
3. Prepare a cash budget.

DUTY AREA
6. PERFORMING MANAGERIAL ACCOUNTING

COURSE
Accounting (6613)

TASK/COMPETENCY
6.4 Analyze accounting information for management decisions.

PERFORMANCE OBJECTIVE
P6.4 Given necessary facts, analyze accounting information for management decisions by determining the effect of changes in volume, cost, unit price, and sales mix on net income. Information must be analyzed according to criteria established in instructor guidelines.

PERFORMANCE MEASURE
M6.4 Written report; rated acceptable according to criteria established in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare an income statement reporting contribution margin.
2. Calculate the break-even point in sales volume and sales units.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 7. PROCESSING PAYROLL AND RELATED RECORDS

7.1 Complete payroll records.
7.2 Record payroll transactions in journal.
7.3 Chart how a payroll is processed by computer.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	7.2, 7.3
• Read with comprehension.	7.2
• Demonstrate both pre-planned and spontaneous speaking.	7.3
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	7.3
• Demonstrate teamwork and group problem-solving techniques.	7.3
• Interpret technical information.	7.2, 7.3
• Demonstrate a sense of responsibility for participating in discussions.	7.3
• Take notes from written, oral, and audiovisual materials.	7.3
• Write, revise, edit, proofread, and document papers.	7.1, 7.2, 7.3
• Demonstrate tolerance and respect for individual differences.	
• Give clear oral and written directions.	
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	7.1, 7.2
• Follow multistep oral and written instructions.	7.1, 7.2, 7.3
• Communicate ideas and feelings through creative activities.	7.3
• Maintain vocabulary reading skills to prepare for successive materials being taught.	7.1, 7.2, 7.3
• Complete forms with accuracy.	7.1, 7.2, 7.3
• Ask questions necessary to gain information.	
• Develop oral and written solutions to problems.	7.3

*Based on locally derived occupational information

DUTY AREA
7. PROCESSING PAYROLL AND RELATED RECORDS

COURSE
Accounting (6320)
Accounting (6613)

TASK/COMPETENCY
7.1 Complete payroll records.

PERFORMANCE OBJECTIVE
P7.1 Given time cards, company policy for computing hours, employee wage information, and proper forms, complete payroll records by preparing payroll register and an employee's earnings records with 100% accuracy.

PERFORMANCE MEASURE
M7.1 Payroll records; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define terms related to employee earnings.
2. Explain differences in varied wages and salary plans.
3. Complete W-4 Form.
4. Analyze a payroll time card and calculate total earnings.
5. Explain the difference between gross earnings and net pay.
6. Identify various deductions that could affect a person's paycheck.
7. Record employee information and earnings on a payroll register.
8. Calculate deductions for federal and state income tax, FICA tax, and other deductions.
9. Calculate net pay.
10. Total, prove, and rule payroll register.
11. Prepare payroll checks.
12. Record information from payroll register to employee's earnings record.

DUTY AREA
7. PROCESSING PAYROLL AND RELATED RECORDS

COURSE
Accounting (6320)

TASK/COMPETENCY
7.2 Record payroll transactions in journal.

PERFORMANCE OBJECTIVE
P7.2 Given a payroll register and appropriate journals, record payroll transactions in journal according to instructor guidelines.

PERFORMANCE MEASURE
M7.2 Recorded payroll transactions; all components rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Journalize payroll transactions.
2. Journalize employer's payroll taxes.

DUTY AREA
7. PROCESSING PAYROLL AND RELATED RECORDS

COURSE
Accounting (6320)

TASK/COMPETENCY
7.3 Chart how a payroll is processed by computer.

PERFORMANCE OBJECTIVE
P7.3 Given a situation in which a payroll is to be processed by computer (identifying the input processing and output components), chart how a payroll is processed by computer in accordance with instructor checklist.

PERFORMANCE MEASURE
M7.3 Steps charted in sequence; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the input, processing, and output components used in a computerized payroll system.
2. Explain the processing of a computerized payroll from the steps outlined on a flowchart.
3. List steps followed for processing a payroll by computer.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS

8.1 Identify devices used for processing data electronically.
8.2 Create a spreadsheet.
8.3 Modify a spreadsheet.
8.4 Work with payroll reports using multiple spreadsheets.
8.5 Create graphs.
8.6 Begin an automated accounting system.
8.7 Prepare forms to complete an automated accounting system.
8.8 Perform computerized accounting cycle activities for a proprietorship.
8.9 Perform file maintenance activities for a departmentalized automated accounting system.
8.10 Record business transactions for a departmentalized automated accounting system.
8.11 Set up payroll files for a departmentalized automated accounting system.
8.12 Use a departmentalized automated accounting system to process payroll.
8.13 Perform end-of-fiscal period work for a departmentalized automated accounting system.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Read with comprehension.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Demonstrate both pre-planned and spontaneous speaking.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Demonstrate teamwork and group problem-solving techniques.	
• Interpret technical information.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Demonstrate a sense of responsibility for participating in discussions.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9 8.10, 8.11, 8.12, 8.13
• Take notes from written, oral, and audiovisual materials.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Write, revise, edit, proofread, and document papers.	8.7, 8.8, 8.9, 8.10, 8.11, 8.12
• Demonstrate tolerance and respect for individual differences.	
• Give clear oral and written directions.	8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	8.1, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12
• Follow multistep oral and written instructions.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Communicate ideas and feelings through creative activities.	8.8, 8.9, 8.10, 8.11, 8.12
• Maintain vocabulary reading skills to prepare for successive materials being taught.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Complete forms with accuracy.	8.7, 8.8, 8.11, 8.12, 8.13
• Ask questions necessary to gain information.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10, 8.11, 8.12, 8.13
• Develop oral and written solutions to problems.	8.8, 8.9, 8.10, 8.11, 8.12

*Based on locally derived occupational information

DUTY AREA

8. USING ACCOUNTING APPLICATIONS
SOFTWARE SYSTEMS

COURSE

Accounting (6320)
Accounting (6613)

TASK/COMPETENCY

8.1 Identify devices used for processing data electronically.

PERFORMANCE OBJECTIVE

P8.1 Given review information, identify devices used for processing data electronically by matching components with their descriptions (or pictures). Identify the central processing unit, the disks, the keyboard, the display terminal and numeric pad, the printer, input, and output devices. Identification must be made with a minimum of 70% accuracy.

PERFORMANCE MEASURE

M8.1 Matching test; a minimum of 70% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the central processing unit.
2. Identify the floppy disk and hard/fixed disk drives.
3. Identify the keyboard.
4. Identify the monitor/video display terminal/screen and numeric keypad.
5. Identify printer (impact, nonimpact).
6. Identify special input devices (mouse, touch screen, light pen, voice recognition equipment, modem, OCR).
7. Identify special output devices.

DUTY AREA
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS

COURSE
Accounting (6320)
Accounting (6613)

TASK/COMPETENCY
8.2 Create a spreadsheet.

PERFORMANCE OBJECTIVE
P8.2 Given several exercises involving data to be displayed in rows and columns, use computer program to create a spreadsheet with 100% accuracy.

PERFORMANCE MEASURE
M8.2 Copy of spreadsheet; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Outline history of spreadsheets.
2. Explain start-up procedures for software.
3. Identify parts of the spreadsheet.
4. Move around the spreadsheet.
5. Enter text, numbers, and dates.
6. Use the menu.
7. Access the help screens.
8. Save and retrieve a spreadsheet.
9. Align labels.
10. Edit entries.
11. Enter simple formulas and @ functions.
12. Explain the precedence of operators.
13. Use the Undo feature.
14. Work with blocks (define, copy, move, erase, name, fill with numbers, and search).

DUTY AREA	**COURSE**
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

8.3 Modify a spreadsheet.

PERFORMANCE OBJECTIVE

P8.3 Given appropriate software and budget problems, use spreadsheet software to modify a spreadsheet according to instructor guidelines. Modification should include column widths, use of columns and rows, statistical @ functions, formatted numbers, copied formulas, use of templates, fonts, line draw, and shading.

PERFORMANCE MEASURE

M8.3 Copy of spreadsheet; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Change column widths.
2. Insert and delete columns and rows.
3. Work with statistical @ functions.
4. Format numbers.
5. Address cells properly for copying formulas (relative and absolute).
6. Create and work with templates.
7. Use fonts, line draw, and shading.

DUTY AREA	**COURSE**
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

8.4 Work with payroll reports using multiple spreadsheets.

PERFORMANCE OBJECTIVE

P8.4 Given appropriate software and payroll information, work with payroll reports using multiple spreadsheets with 100% accuracy. Make use of window options (tile, stack, zoom, move among windows, and move and resize).

PERFORMANCE MEASURE

M8.4 Payroll reports using multiple spreadsheets; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Work with locked titles and split screens.
2. Open multiple spreadsheets.
3. Move among windows.
4. Tile, stack, and zoom windows.
5. Move and resize windows.
6. Save and retrieve workspaces.
7. Copy and move data between windows.
8. Extract and combine files.
9. Link spreadsheets.

DUTY AREA

8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS

COURSE

Accounting (6320)
Accounting (6613)

TASK/COMPETENCY

8.5 Create graphs.

PERFORMANCE OBJECTIVE

P8.5 Given appropriate software and necessary information, use spreadsheet software to create graphs according to criteria specified in instructor guidelines. Differentiate between graph types and insert graphs in spreadsheet.

PERFORMANCE MEASURE

M8.5 Copy of graph; rated acceptable according to criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Differentiate between graph types.
2. Create a graph.
3. Add text to the graph.
4. Save, change, and restore graphs.
5. Print graphs.
6. Insert graphs in spreadsheet.

DUTY AREA

8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS

COURSE

Accounting (6320)
Accounting (6613)

TASK/COMPETENCY

8.6 Begin an automated accounting system.

PERFORMANCE OBJECTIVE

P8.6 Given a group of accounts and balances, begin an automated accounting system by preparing a file maintenance input form and recording an opening entry. Maintenance input form must be filed with 100% accuracy.

PERFORMANCE MEASURE

M8.6 Filed maintenance input form; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define accounting terms related to starting an automated accounting system.
2. Identify accounting concepts and practices related to starting an automated accounting system.
3. Record an opening entry on a general ledger input form.

DUTY AREA	**COURSE**
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

8.7 Prepare forms to complete an automated accounting system.

PERFORMANCE OBJECTIVE

P8.7 Given a group of accounts and balances, transactions, and adjustment information, prepare forms to complete an automated accounting system with 100% accuracy.

PERFORMANCE MEASURE

M8.7 Input forms; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define accounting terms related to using an automated accouting system.
2. Identify accounting concepts and practices related to using an automated accounting system.
3. Perform file maintenance activities.
4. Record transactions on a general ledger input form.
5. Plan adjusting entries.
6. Record adjusting entries on general ledger input form.

DUTY AREA	**COURSE**
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

8.8 Perform computerized accounting cycle activities for a proprietorship.

PERFORMANCE OBJECTIVE

P8.8 Given appropriate input forms and necessary data, perform computerized accounting cycle activities for a proprietorship with 100% accuracy.

PERFORMA NCE MEASURE

M8.8 Computerized accounting cycle; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare input forms.
2. Key-enter data from input forms.
3. Display/print accounting reports.

DUTY AREA	COURSE
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

8.9 Perform file maintenance activities for a departmentalized automated accounting system.

PERFORMANCE OBJECTIVE

P8.9 Given a group of accounts and balances, perform file maintenance activities for a departmentalized automated accounting system with at least 95% accuracy. Include a journal entries input form, and display as well as print data of the file maintenance reports.

PERFORMANCE MEASURE

M8.9 File maintenance; a minimum of 95% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define accounting terms related to an automated departmentalized accounting system.
2. Identify accounting concepts and practices related to chart of accounts file maintenance activities for an automated departmentalized merchandising business.
3. Prepare a file maintenance input form to add and delete accounts for an automated departmentalized merchandising business.
4. Prepare a journal entries input form to divide an account balance.
5. Key-enter data from input forms.
6. Display/print data of the maintenance reports.

DUTY AREA

8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS

COURSE

Accounting (6320)
Accounting (6613)

TASK/COMPETENCY

8.10 Record business transactions for a departmentalized automated accounting system.

PERFORMANCE OBJECTIVE

P8.10 Given a group of selected transactions and journal entries input forms, record business transactions for a departmentalized automated accounting system with 100% accuracy.

PERFORMANCE MEASURE

M8.10 Recorded business transactions; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify accounting concepts and practices related to recording and posting departmentalized business transactions in an automated accounting system.
2. Record business transactions for a departmentalized automated accounting system.
3. Prepare journal entries input forms.
4. Key-enter data from input forms.
5. Display/print journal entries reports.

DUTY AREA

8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS

COURSE

Accounting (6320)
Accounting (6613)

TASK/COMPETENCY

8.11 Set up payroll files for a departmentalized automated accounting system.

PERFORMANCE OBJECTIVE

P8.11 Given appropriate software and payroll information, set up payroll files for a departmentalized automated accounting system with 100% accuracy, using an employee master file, a beginning check number, and a quarterly/yearly balance.

PERFORMANCE MEASURE

M8.11 Payroll reports; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Build an employee master file.
2. Set the beginning check number.
3. Enter the quarterly/yearly balance.

DUTY AREA	**COURSE**
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY
8.12 Use a departmentalized automated accounting system to process payroll.

PERFORMANCE OBJECTIVE
P8.12 Given appropriate software and payroll information, use a departmentalized automated accounting system to process payroll with 100% accuracy.

PERFORMANCE MEASURE
M8.12 Payroll reports; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Perform employee file maintenance.
2. Enter and correct payroll transactions.
3. Display or print a payroll proof.
4. Display or print a payroll register.
5. Display or print a quarterly report.
6. Display or print annual W-2 statement.

DUTY AREA	**COURSE**
8. USING ACCOUNTING APPLICATIONS SOFTWARE SYSTEMS	Accounting (6320) Accounting (6613)

TASK/COMPETENCY
8.13 Perform end-of-fiscal-period work for a departmentalized automated accounting system.

PERFORMANCE OBJECTIVE
P8.13 Given selected general ledger accounts and journal entries input forms, perform end-of-fiscal period work for a departmentalized automated accounting system. Work must be performed with 100% accuracy.

PERFORMANCE MEASURE
M8.13 General ledger for end-of-fiscal-period; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify accounting concepts and practices related to end-of-fiscal period work in an automated departmentalized accounting system.
2. Arrange adjusting entries needed to update general ledger account balances.
3. Record adjusting entries on a journal entries input form.
4. Key-enter data from input forms.
5. Display/print accounting reports.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 9. MAINTAINING OFFICE EQUIPMENT

9.1 Clear paper jams in calculator and printer.
9.2 Change paper in calculators and cartridges in printers.
9.3 Load paper into calculator and printer.

LANGUAGE ARTS COMPETENCIES/STANDARDS*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	9.1, 9.2, 9.3
• Read with comprehension.	9.1, 9.2, 9.3
• Demonstrate both pre-planned and spontaneous speaking.	9.1, 9.2, 9.3
• Demonstrate critical thinking skills (synthesize, interpret, draw conclusions, differentiate between real and make believe).	9.1, 9.2, 9.3
• Demonstrate teamwork and group problem-solving techniques.	9.1, 9.2, 9.3
• Interpret technical information.	
• Demonstrate a sense of responsibility for participating in discussions.	9.1, 9.2, 9.3
• Take notes from written, oral, and audiovisual materials.	9.2, 9.3
• Write, revise, edit, proofread, and document papers.	9.2, 9.3
• Demonstrate tolerance and respect for individual differences.	9.1, 9.2, 9.3
• Give clear oral and written directions.	9.1
• Use the dictionary and glossary to obtain information about spelling, meaning, and pronunciation of words.	9.2, 9.3
• Follow multistep oral and written instructions.	
• Communicate ideas and feelings through creative activities.	9.1, 9.2, 9.3
• Maintain vocabulary reading skills to prepare for successive materials being taught.	
• Complete forms with accuracy.	
• Ask questions necessary to gain information.	9.1, 9.2, 9.3
• Develop oral and written solutions to problems.	9.1, 9.2, 9.3

*Based on locally derived occupational information

DUTY AREA	**COURSE**
9. MAINTAINING OFFICE EQUIPMENT	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

9.1 Clear paper jams in calculator and printer.

PERFORMANCE OBJECTIVE

P9.1 Given access to calculator and printer with paper jams, clear paper jams in calculator and printer according to directions given in the operator's manual or by instructor demonstration. Machines must operate with 100% efficiency.

PERFORMANCE MEASURE

M9.1 Student demonstration; 100% efficiency required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Use safety precautions applicable to specific calculator or printer.
2. Explain use of machine-specific materials.
3. List steps in clearing a paper jam.

DUTY AREA	**COURSE**
9. MAINTAINING OFFICE EQUIPMENT	Accounting (6320) Accounting (6613)

TASK/COMPETENCY

9.2 Change paper in calculators and cartridges in printers.

PERFORMANCE OBJECTIVE

P9.2 Given access to calculator and printer and necessary supplies, change paper in calculators and cartridges in printers according to directions in the operator's manual or by instructor demonstration. Machines must operate with 100% efficiency.

PERFORMANCE MEASURE

M9.2 Student demonstration; 100% efficiency required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Use safety precautions applicable to specific calculator and printer.
2. Explain use of machine-specific materials.
3. List steps for changing paper and cartridges.

DUTY AREA
9. MAINTAINING OFFICE EQUIPMENT

COURSE
Accounting (6320)
Accounting (6613)

TASK/COMPETENCY
9.3 Load paper into calculator and printer.

PERFORMANCE OBJECTIVE
P9.3 Given access to calculator, printer, and paper, or pre-printed forms, load paper into calculator and printer according to operator's manual or instructor checklist.

PERFORMANCE MEASURE
M9.3 Student demonstration; rated acceptable according to operator's manual or instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the types and sizes of paper available for calculators and printers.
2. Explain how to select the appropriate type and size of paper for a specific job.
3. Demonstrate how to set printer options to match size and type of paper.
4. Explain the importance of form alignment when using pre-printed forms and demonstate how to align.

DUTY AREA

10. PREPARING FOR INSTRUCTIONAL ACTIVITIES
Essential Postsecondary Tasks

TASKS/COMPETENCIES

10.1 Identify course expectations.
10.2 Identify job opportunities in accounting.
10.3 List the types of accounting work and the corresponding job skills.
10.4 Demonstrate the computational and computer skills required to interpret numerical data and to manipulate data to solve accounting problems.
10.5 Demonstrate the communication skills that accountants use to resolve business situations.
10.6 Describe job requirements.

DUTY AREA | **COURSE**

10. PERFORMING FOR INSTRUCTIONAL ACTIVITIES | Accounting Classes

TASK/COMPETENCY

10.1 Identify course expectations.

PERFORMANCE OBJECTIVES

P10.1 Given information about an accounting course, identify course expectations. Identification should be based on criteria specified in instructor guidelines.

PERFORMANCE MEASURE

M10.1 Outline of course expectations; rated acceptable according to criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. List all rules and academic regulations of the institution.
2. List course objectives.
3. Outline responsibilities of student and teacher.
4. Describe the classroom and institution management systems.
5. Outline the minimum requirements for completing the course.
6. Describe the grading system.
7. Explain the student's responsibility outside the formal classroom.

DUTY AREA | **COURSE**

10. PREPARING FOR INSTRUCTIONAL ACTIVITIES | Accounting Classes

TASK/COMPETENCY

10.2 Identify job opportunities in accounting.

PERFORMANCE OBJECTIVE

P10.2 Given information on both profit and nonprofit business organizations, identify job opportunities in accounting. Identification should be made according to instructor guidelines.

PERFORMANCE MEASURE

M10.2 Oral presentation; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify accounting jobs relating to the business world in both profit and nonprofit organizations.
2. Explain the various duties in accounting, from entering data into the system to reporting the information.
3. Describe future job opportunities for accountants.

DUTY AREA
10. PREPARING FOR INSTRUCTIONAL ACTIVITIES

COURSE
Accounting Classes

TASK/COMPETENCY
10.3 List the types of accounting work and the corresponding job-skill requirements.

PERFORMANCE OBJECTIVE
P10.3 Given the variety of accounting tasks, list the types of accounting work and the corresponding job-skill requirements. List should be prepared in accordance with isntructor guidelines.

PERFORMANCE MEASURE
M10.3 Student-produced chart; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. In the bookkeeping process, identify how the books should be maintained to meet current standards. **Requirement**–knowledge of double-entry system
2. In a general accounting practice, identify how the accountant responds to organizational needs. **Requirement**–knowledge of accounting transactions and reports
3. In the area of tax practice, identify how the accountant responds to the rules and regulations of the taxing authority. **Requirement**– knowledge of tax laws and regulations
4. In the area of auditing, identify how the accountant handles an audit. **Requirement**–knowledge of auditing standards
5. In the area of governmental accounting, identify how the accountant manages taxpayer funds in accordance with governmental regulations. **Requirement**–knowledge of governmental regulations
6. In the area of management consulting, identify how the accountant meets the needs of the company that hired him/her. **Requirement**–knowledge of accounting system design
7. In the public accounting field, identify how the accountant responds to the general public. **Requirement**–knowledge of certified accounting skills

DUTY AREA
10. PREPARING FOR INSTRUCTIONAL ACTIVITIES

COURSE
Accounting Classes

TASK/COMPETENCY

10.4 Demonstrate the computational and computer skills required to interpret numerical data and to manipulate data to solve accounting problems.

PERFORMANCE OBJECTIVE

P10.4 Given the automated functions in accounting, demonstrate the computational and computer skills required to interpret numerical data and to manipulate data to solve accounting problems. Spreadsheet, general ledger, and integrated accounting package applications should be used according to instructor guidelines.

PERFORMANCE MEASURE

M10.4 Worksheet; evaluated according to criteria based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define computerized accounting.
2. Identify equipment available.
3. Identify basic computer skills needed.
4. Identify and explain spreadsheet applications.
5. Identify and explain general ledger application programs.
6. Identify and explain integrated accounting package applications.
7. Demonstrate the use of accounting software as it applies to problem solving.
8. Summarize the different hardware and software configuration applicable to automated accounting functions.

DUTY AREA
10. PREPARING FOR INSTRUCTIONAL ACTIVITIES

COURSE
Accounting Classes

TASK/COMPETENCY

10.5 Demonstrate the communication skills that accountants use to resolve business situations.

PERFORMANCE OBJECTIVE

P10.5 Given information concerning the verbal and written skills needed in accounting, demonstrate the communication skills that accountants use to resolve business situations. The following skills will be utilized: speaking, listening, interpersonal, grammatical, compositional, and structural. Demonstration should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE

M10.5 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify effective speaking skills.
2. Identify effective listening skills.
3. Describe effective presentational materials.
4. Identify effective interpersonal skills.
5. Explain role of grammar in composition.
6. Demonstrate the use of punctuation.
7. Demonstrate the process of organizing material.
8. Demonstrate sentence structure.
9. Demonstrate paragraph structure.
10. Demonstrate summarizing and concluding material.

DUTY AREA
10. PREPARING FOR INSTRUCTIONAL ACTIVITIES

COURSE
Accounting Classes

TASK/COMPETENCY
10.6 Describe job requirements.

PERFORMANCE OBJECTIVE
P10.6 Given the variety of skills needed in accounting, describe job requirements. The description should cover the wide range of math, reading, computer, written, oral, and interpersonal skills and should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M10.6 Class divided in groups for poster presentation/oral report on each accounting job skill; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. List computational skills.
2. List computer skills.
3. List speaking skills.
4. List writing skills.
5. List educational skills.
6. List professional requirements.
7. List reading skills.
8. List interpersonal skills.
9. List ethical skills.
10. List organizational, group, and individual behavior skills.
11. List decision-making skills.
12. List learning skills.

DUTY AREA

11. PERFORMING COST ACCOUNTING
Essential Postsecondary Tasks

TASKS/COMPETENCIES

11.1 Process cost accounting information.
11.2 Process budget information.
11.3 Perform cost accounting analysis.

DUTY AREA	COURSE
11. PERFORMING COST ACCOUNTING	Accounting 231

TASK/COMPETENCY

11.1 Process cost accounting information.

PERFORMANCE OBJECTIVE

P11.1 Given the required business data from a manufacturing company, process cost accounting information using the data. Information will be partly determined by actual cost of a product vs. the selling cost of the product. A report should be prepared according to instructor guidelines.

PERFORMANCE MEASURE

M11.1 Cost accounting report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the role of cost accounting in an organization.
2. Specify the objective of cost accounting and how it relates to company goals.
3. Use cost information to determine the actual cost of a product.
4. Use cost accounting data to control costs.
5. Use cost accounting to determine the selling price of a product.
6. Explain how cost accounting data is used to evaluate performance.
7. Prepare a schedule of Cost of Goods Manufactured.
8. Describe the flow of cost through a cost information system.
9. Explain the use of cost accounting data in analyzing profitability.
10. Collect, classify, and assign costs to products in a job order cost system.
11. Collect, classify, and assign costs to products in a process costing system.

DUTY AREA
11. PERFORMING COST ACCOUNTING

COURSE
Accounting 231

TASK/COMPETENCY
11.2 Process budget information.

PERFORMANCE OBJECTIVE
P11.2 Given budget information necessary to plan and evaluate the performance of a cost accounting system, process budget information to achieve organizational goals according to instructor specifications. The process should include identification of a budget as a useful management tool as well as identification and demonstration of the different types of budgets.

PERFORMANCE MEASURE
M11.2 Group project; rated acceptable according to instructor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain how a budget is a useful management tool.
2. Identify and describe the different types of budgets.
3. Describe the preparation and use of a master budget.
4. Prepare and show the use of a sales budget.
5. Prepare and show the use of a direct-materials budget.
6. Prepare and show the use of a direct-labor budget.
7. Prepare and show the use of a factory overhead budget.
8. Prepare and show the use of a selling and administration budget.
9. Prepare and show the use of a capital budget.
10. Prepare and show the use of a financial budget.
11. Prepare and show the use of cost-of-goods-sold budget.
12. Prepare and show the use of a cash budget.
13. Prepare *pro forma* financial statements based on various budgets used in the manufacturing process.

DUTY AREA
11. PERFORMING COST ACCOUNTING

COURSE
Accounting 231

TASK/COMPETENCY
11.3 Perform cost accounting analysis.

PERFORMANCE OBJECTIVE
P11.3 Given information about a cost accounting system, perform cost accounting analysis in accordance with instructor checklist.

PERFORMANCE MEASURE
M11.3 Cost analysis; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the differences between direct costing and absorption costing methods between direct and indirect costs.
2. Describe segment profitability analysis and the necessary distinction between direct and indirect costs.
3. Outline the uses and limitations of cost-volume-profit analysis in management decision making.
4. Identify the techniques used to analyze and control the distribution costs incurred in selling and delivering products.

DUTY AREA

12. PERFORMING AUDITING FUNCTIONS

Essential Postsecondary Tasks

TASKS/COMPETENCIES

12.1 Summarize data for external auditors.
12.2 Assist external auditors.
12.3 Document internal controls.
12.4 Select statistical samples.
12.5 Perform inventory count.
12.6 Prepare a proof of cash reconciliation and analysis.
12.7 Prepare financial reports.
12.8 Process confirmation letters.

DUTY AREA	**COURSE**
12. PERFORMING AUDITING FUNCTIONS	Accounting 241

TASK/COMPETENCY
12.1 Summarize data for external auditors.

PERFORMANCE OBJECTIVE
P12.1 Given notice of an audit, collect and summarize data for external auditors according to auditor specifications. Data irregularities and errors should be considered when compiling the information.

PERFORMANCE MEASURE
M12.1 Vouchered accounting system documents; rated acceptable according to auditor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Demonstrate an understanding of documents in an accounting system.
2. Explain the flow of documents through the accounting system.
3. Identify and trace documents to an account.
4. Describe the relationship of documents to other financial information within the period being audited.
5. Demonstrate an understanding of omission of collection data within an accounting system.
6. Explain irregularities of accounting data within an accounting system.
7. Explain errors that are material in an audit proceeding.
8. Identify physical evidence that is to be collected in the evidence gathering segment of an audit.
9. Describe the degree of risk involved in the collection process.
10. Outline the computations involved in placing valuations on data collection.
11. Summarize and prove all data collected for presentation to the external auditors.
12. Prepare and record in presentable form all summarized data for auditors.

DUTY AREA	**COURSE**
12. PERFORMING AUDITING FUNCTIONS	Accounting 241

TASK/COMPETENCY
12.2 Assist external auditors.

PERFORMANCE OBJECTIVE
P12.2 Given notice of an audit to be conducted, assist external auditors using written, oral, computational, and computer skills. Assistance should be based on instructor guidelines.

PERFORMANCE MEASURE
M12.2 Instructor-prepared checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define the terms needed to converse with external auditors.
2. Define the elements of an accounting system operation needed to assist external auditors.
3. Explain the behavioral characteristics needed to assist auditors.
4. Analyze the communications skills needed to assist external auditors.
5. Explain the writing skills required to assist external auditors.
6. Identify the computational skills to assist external auditors.
7. Explain the computer skills required to assist external auditors.

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DUTY AREA **COURSE**
12. PERFORMING AUDITING FUNCTIONS Accounting 241

TASK/COMPETENCY
12.3 Document internal controls.

PERFORMANCE OBJECTIVE
P12.3 Given notice of an audit to be conducted, document internal controls with 100% accuracy. Documentation should reflect an understanding of the effect of the auditor's responsibilities, such as the discovery of errors and irregularities and evidence of illegal acts by clients.

PERFORMANCE MEASURE
M12.3 Documentation; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of internal control to the audit function.
2. Explain the concept of audit risk, including the components of the audit risk model addressed by audit standard No. 47.
3. Analyze the nature of internal control and its goals, including the elements of an effective internal control system.
4. Explain how an audit program is affected by the degree of internal control present.
5. Identify how the auditor goes about reviewing, documenting, and evaluating the strength or weakness of an internal control structure.
6. Explain the use of tests of controls.
7. Outline the auditor's responsibilities if errors and irregularities are uncovered.
8. Describe the auditor's responsibilities if evidence of illegal acts by clients is uncovered.
9. Identify specific internal control objectives and specific internal control procedures related to major categories of transactions.

DUTY AREA **COURSE**
12. PERFORMING AUDITING FUNCTIONS Accounting 241

TASK/COMPETENCY
12.4 Select statistical samples.

PERFORMANCE OBJECTIVE
P12.4 Given notice of an audit to be conducted, select statistical samples that will be the basis for evaluating account transactions. Selection should be made in accordance with instructor specifications.

PERFORMANCE MEASURE
M12.4 Construction of statistical sampling plan, ensuring the law of probabiliities; evaluated according to instructor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the difference between statistical and nonstatistical sampling procedures.
2. Describe the distinct objectives of testing in auditing-protection, estimation, discovery, correction, and prevention.
3. Define statistical concepts including population, sample, mean, variability, normal distribution, precision, and reliability.
4. Select a statistical sample.
5. Determine a sample size.
6. Apply attribute estimation sampling.
7. Apply variables estimation sampling.
8. Explain how sampling is applied in practice.

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DUTY AREA
12. PERFORMING AUDITING FUNCTIONS

COURSE
Accounting 241

TASK/COMPETENCY
12.5 Perform inventory count.

PERFORMANCE OBJECTIVE
P12.5 Given notice of an audit to be conducted, perform inventory count with 100% clerical accuracy to determine whether inventories are presented fairly in financial statements.

PERFORMANCE MEASURE
M12.5 Inventory count; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. List essential elements of the internal control structure of inventories.
2. Explain the need for and the methods for performing and testing physical inventories.
3. Identify procedures for determining that receiving and shipping cutoffs were proper.
4. Describe means of determining whether the basis of pricing inventory used by the company conforms to generally accepted accounting principles applied on a consistent basis.
5. Identify the methods used to conduct an actual physical count of the inventory.
6. Properly record an inventory.
7. Explain how an inventory is counted.
8. Test for clerical accuracy of the inventory.

DUTY AREA
12. PERFORMING AUDITING FUNCTIONS

COURSE
Accounting 241

TASK/COMPETENCY
12.6 Prepare a proof of cash reconciliation and analysis.

PERFORMANCE OBJECTIVE
P12.6 Given notice of an audit to be conducted, prepare a proof of cash reconciliation and analysis with 100% accuracy. Analysis should include proving accuracy, testing deposits, and investigating other reconciling items.

PERFORMANCE MEASURE
M12.6 Bank reconciliation; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Trace the bank balance and the book balance from the bank statement to the reconciliation to the general ledger.
2. Prove the arithmetical accuracy of the outstanding checklist.
3. Prove the outstanding checklist by examining the preparation dates and the bank clearing dates of the checks which clear during the month after the reconciliation date.
4. Test deposits in transit by reference to cash receipts and subsequent bank statements.
5. Investigate other reconciling items by examining underlying supporting documents.
6. Prove the arithmetical accuracy of the reconciliation.
7. Trace reconciled cash receipts and cash disbursements book balances to the books of original entry and to the general ledger postings.
8. Explain by detailed analysis the import of items 1-7 on the proof of cash statement as evidenced by the four-way reconciliation document.

DUTY AREA **COURSE**
12. PERFORMING AUDITING FUNCTIONS Accounting 241

TASK/COMPETENCY
12.7 Prepare financial reports.

PERFORMANCE OBJECTIVE
P12.7 Given notice of an audit to be conducted, prepare financial reports with 100% accuracy. Use a worksheet, a balance sheet, an income statement, a statement of change in owner's equity, and a statement of cash flow.

PERFORMANCE MEASURE
M12.7 Presentation of financial statements; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the financial reports required in an audit program.
2. Complete the preparation of a 10-column worksheet as a basis for financial reports.
3. Prepare a balance sheet.
4. Prepare an income statement.
5. Prepare a statement of change in owner's equity.
6. Prepare a statement of cash flow.

DUTY AREA **COURSE**
12. PERFORMING AUDITING FUNCTIONS Accounting 241

TASK/COMPETENCY
12.8 Process confirmation letters.

PERFORMANCE OBJECTIVE
P12.8 Given auditors' information, process confirmation letters requested by auditors in a timely manner according to instructor specifications.

PERFORMANCE MEASURE
M12.8 Letter of response; rated acceptable according to instructor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe an audit program sample confirmation letter.
2. Explain alternative procedures when a confirmation cannot be used.
3. Identify the positive request method.
4. Identify the negative request method.
5. Identify the combination positive/negative request method.
6. Define the extent of confirmation required in an audit.
7. Analyze the controlling of confirmation requests.
8. Explain the exceptions to confirmation requests.
9. Prepare an account payable confirmation request.
10. Prepare an account receivable confirmation request.
11. Prepare a bank confirmation request.
12. Prepare a securities confirmation request.

DUTY AREA
13. PERFORMING TAX FUNCTIONS
Essential Postsecondary Tasks

TASKS/COMPETENCIES

13.1 Collect tax data and records.
13.2 Prepare individual federal income tax returns.
13.3 Prepare individual state income tax returns.
13.4 Prepare payroll tax returns.
13.5 Prepare information returns.

DUTY AREA
13. PERFORMING TAX FUNCTIONS

COURSE
Accounting 261

TASK/COMPETENCY
13.1 Collect tax data and records.

PERFORMANCE OBJECTIVE
P13.1 Given materials and information necessary to file tax returns, collect tax data and records (including medical items and receipts), to fulfill filing requirements. Collection should be made in accordance with instructor checklist.

PERFORMANCE MEASURE
M13.1 Collection of documents and forms; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Collect Forms W-2, W-2G, and various 1099 forms needed to provide data for filing.
2. Collect medical and dental payment records.
3. Collect receipts for real estate and personal property taxes.
4. Collect interest payment records relating to a home mortgage.
5. Collect records for payments for child care.
6. Collect records relating to charitable contributions.
7. Collect receipts to substantiate business expenses.

DUTY AREA
13. PERFORMING TAX FUNCTIONS

COURSE
Accounting 261

TASK/COMPETENCY
13.2 Prepare individual federal income tax returns.

PERFORMANCE OBJECTIVE
P13.2 Given federal income tax return forms, prepare individual federal income tax returns with 100% accuracy. Tax returns should include exemptions, deductions, expenses, credits, and special taxes.

PERFORMANCE MEASURE
M13.2 Student-prepared federal tax forms; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Determine the conditions that must exist before a taxpayer is required to file an income tax return.
2. Identify the different categories of filing status.
3. Explain the personal and dependency exemptions.
4. Explain the standard deduction.
5. Explain the itemized deduction.
6. Define income to be included in a return and income that is not included.
7. Show the adjustments to income and business expenses.
8. Identify the categories of employee expenses.
9. Figure the credits and special taxes.
10. Define an accounting period.
11. Prepare the forms generally required in the preparation of a federal income tax return:
    a. Form 1040 - 1040A - 1040EZ
    b. Schedules A & B
    c. Schedule D
    d. Schedule E
    e. Schedule EIC
    f. Form 2441
    g. Schedule SE
    h. Form 2119
    i. Form 3903
    j. Form 4662

DUTY AREA
13. PERFORMING TAX FUNCTIONS

COURSE
Accounting 261

TASK/COMPETENCY
13.3 Prepare individual state income tax returns.

PERFORMANCE OBJECTIVE
P13.3 Given state income tax return forms, prepare individual state income tax returns with 100% accuracy. Tax returns should include exemptions, deductions, credits, and special taxes.

PERFORMANCE MEASURE
M13.3 State-prepared state tax forms; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Determine the conditions that must exist before a taxpayer is required to file an income tax return.
2. Identify the different categories of filing status.
3. Explain the personal and dependency exemptions.
4. Explain the residency status criteria for filing.
5. Explain the standard deduction.
6. Explain the itemized deduction.
7. Identify the additions and subtractions from Federal Adjusted Gross Income.
8. Compute the credits and special taxes.
9. Prepare the forms generally required in the preparation of a state income tax return.
   a. Form 760 - 760S
   b. Schedule A
   c. Form CU-7

DUTY AREA
13. PERFORMING TAX FUNCTIONS

COURSE
Accounting 212

TASK/COMPETENCY
13.4 Prepare payroll tax returns.

PERFORMANCE OBJECTIVE
P13.4 Given necessary information and proper forms, prepare payroll tax returns with 100% accuracy.

PERFORMANCE MEASURE
M13.4 Student-prepared payroll tax returns; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare Form 941.
2. Prepare Form W-2.
3. Prepare Form 8109.
4. Prepare Form 940 - 940EZ.
5. Prepare Form 8027.

DUTY AREA
13. PERFORMING TAX FUNCTIONS

COURSE
Accounting 261

TASK/COMPETENCY
13.5 Prepare information returns.

PERFORMANCE OBJECTIVE
P13.5 Given forms and data necessary for taxpayers to file returns, prepare information returns with 100% accuracy.

PERFORMANCE MEASURE
M13.5 Student-prepared informational returns; 100% accuracy required

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare Form W-2.
2. Prepare Form 1098.
3. Prepare the various series of Form 1099.
4. Prepare Schedule K-1.

PROGRAM DESIGN

Secondary Course Offerings

Postsecondary Course Requirements

COURSE OFFERINGS

Accounting and Related Offerings
(Secondary Level)

ACCOUNTING I (6320) Grade Level: 10, 11, 12
Prerequisite: Keyboarding (recommended)

ACCOUNTING COMPUTER APPLICATIONS (6613) Grade Level: 11, 12
Prerequisites: Keyboarding (18 weeks) and Accounting I

COURSE REQUIREMENTS

Accounting
(Postsecondary Level)

ACCOUNTING 211	Principles of Accounting I
ACCOUNTING 212	Principles of Accounting II
ACCOUNTING 223-224	Intermediate Accounting I & II
ACCOUNTING 231	Cost Accounting
ACCOUNTING 241	Auditing
ACCOUNTING 261	Principles of Federal Taxation
ACCOUNTING 297	Cooperative Education in Accounting

RESOURCES

Secondary

REFERENCES

Allen and Klooster. *Advanced Automated Accounting for the Microcomputer.* South-Western Publishing Company.

Allen and Klooster. *Automated Accounting for the Microcomputer.* South-Western Publishing Company.

Kushner, John A. *How to Find and Apply for a Job.* South-Western Publishing Company.

McCabe and McCabe. *Writing Effective Resumes: A Complete Guide.* South-Western Publishing Company.

Ross, Hanson, Gilbertson, Lehman, and Swanson. *Century 21 Accounting. Advanced Course.* South-Western Publishing Company.

Ross, Maryanne, Carole P. Swinehart, Diane Hogan, Connie Morrison, Bill Hoyt, and Barry Haber. *Tech Prep Strategies in Accounting.* Glencoe/Macmillan/McGraw-Hill.

Swanson, Ross and Hanson. *Century 21 Accounting. First Year Course.* South-Western Publishing Company.

Understanding Taxes. Internal Revenue Service.

Virginia FBLA Adviser's Manual. Business Program Service. Virginia Department of Education.

Zedllitz, Robert. *Getting a Job Process Kit.* South-Western Publishing Company.

AUDIOVISUAL MATERIALS

Accounting. The One Degree with 360° of Possibilities. (video) American Institute of Certified Public Accountants.

The FBLA Competitive Edge. (video).

Understanding Taxes. (video). Internal Revenue Service.

SOFTWARE

Advanced Automated Accounting for the Microcomputer. 2nd ed. South-Western Publishing Company.

Application Program Diskette for Century 21 Accounting, First-Year Course. Allen and Klooster. 5th ed. South-Western Publishing Company.

Lotus 1-2-3

Peachtree

Quattro Pro

Postsecondary

Dyckman, Bierman, and Morse. *Cost Accounting–Concepts and Managerial Applications.* 2nd ed.

Hermanson, Strawser, and Strawser. *Auditing Theory and Practice.* 5th ed.

Larson and Miller. *Fundamental Accounting Principles.* 13th ed.

Nagy, Vanderbeck and Schmiedicke. *Principles of Cost Accounting.* 9th ed.

Whittenburg, Whittenburg, and Altus-Buller. *Income Tax Fundamentals.* 1994.

Your Federal Income Tax (For Individuals), Publication 17. Internal Revenue Service. 1993.

LEGAL SYSTEMS ADMINISTRATION

Developed by the Tidewater Area Tech Prep Consortium

Tidewater Community College
Chesapeake Public Schools
Norfolk Public Schools
Portsmouth Public Schools
Virginia Beach Public Schools

Dr. Maxine B. Singleton, Project Director

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Virginia Vocational Curriculum and Resource Center
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OCCUPATIONAL ANALYSIS

Occupational Task List, Legal Secretary and Paralegal

A. ASSISTING CLIENTS
   1. Greet clients or visitors.
   2. Conduct client interviews.
   3. Gather client information.
   4. Analyze client information.
   5. Inventory client assets and liabilities.
   6. Establish record-keeping procedures.
   7. Keep client informed.

B. PERFORMING COMMUNICATION FUNCTIONS
   1. Place telephone calls.
   2. Receive and record telephone messages.
   3. Compile and maintain records of long distance telephone calls.
   4. Send and receive facsimile transmissions.
   5. Coordinate meetings, conferences, and conference calls.
   6. Communicate with officers of the court, administrative agencies, and resource persons.
   7. Draft correspondence/memoranda/reports for attorney.
   8. Prepare internal memoranda/reports.
   9. Type letters, memoranda, and reports.
   10. Maintain professionalism and ethical standards.
   11. Send and receive electronic mail.
   12. Initiate paging transmission.
   13. Prioritize and disseminate information.

C. IMPLEMENTING LEGAL PROCEDURES
   1. Obtain signatures.
   2. Act as notary public.
   3. File pleadings and/or documents with court or other administrative agency.
   4. Obtain certified/attested/authenticated documents.
   5. Monitor service of process.
   6. Obtain hearing and/or court dates.

D. PERFORMING INVESTIGATIVE FUNCTIONS
   1. Access court/administrative/governmental records.
   2. Analyze court/administrative/governmental records.
   3. Prepare freedom of information request.
   4. Conduct nonlegal research.
   5. Analyze existing evidence.
   6. Gather physical evidence.
   7. Locate persons.
   8. Interview witnesses.
   9. Verify investigative information.
   10. Summarize documents/materials.

E. PERFORMING LEGAL RESEARCH

1. Locate legal research information.
2. Use law library and other relevant sources.
3. Locate relevant statutory law.
4. Locate relevant administrative law.
5. Locate relevant case law.
6. Utilize Shepard's citators.
7. Apply accepted methods of citation.

F. ASSISTING IN LITIGATION PROCESS

1. Prepare request for service of process.
2. Draft petition.
3. Draft pleadings and discovery.
4. Type pleadings and discovery.
5. Draft papers for bankruptcy.
6. Type papers for bankruptcy.
7. Type briefs.
8. Draft papers for probate.
9. Type papers for probate.
10. Draft final accountings of estates.
11. Type final accountings of estates.
12. Schedule deposition.
13. Prepare for deposition.
14. Assist at deposition.
15. Index/summarize depositions.
16. Type summaries of depositions.
17. Assist in case management.
18. Prepare summary of case facts.
19. Set up document index.
20. Prepare exhibits for trial.
21. Assist during trial.

G. PREPARING FORMS AND DOCUMENTS

1. Obtain printed forms.
2. Type forms (e.g., tax returns, employer identification, collection, real estate forms).
3. Revise existing documents.
4. Proofread prepared materials.
5. Type agreements, contracts, leases from dictation/transcription.
6. Draft bills of sales.
7. Type and process bills of sales.
8. Draft simple wills and codicils.
9. Draft complex wills and codicils.
10. Prepare promissory notes.
11. Prepare powers of attorney.
12. Prepare articles of incorporation.
13. Prepare corporation minute books and stock certificates.
14. Type marriage agreements (i.e., pre- and postnuptial).
15. Prepare divorce decrees.
16. Prepare property and settlement agreements.

H. PERFORMING OFFICE FUNCTIONS

1. Purchase office supplies.
2. Type attorney's time sheet.
3. Maintain a daily log of employer/employee activities.
4. Maintain time records.
5. Maintain personal calendar.
6. Coordinate duties with other employees.
7. Make arrangements for employer's trips.
8. Establish an itinerary for employer(s).
9. Take dictation.
10. Transcribe legal correspondence, reports, and memoranda.
11. Process incoming and outgoing mail.
12. Arrange for courier services.
13. Deliver interoffice mail.
14. Develop organizational systems.
15. Maintain computer case files for client access.
16. Perform computerized internal/external recordkeeping.

I. PERFORMING FILING DUTIES

1. Establish and/or maintain systems of filing.
2. Establish and/or maintain files of addresses and phone numbers.
3. Establish and/or maintain file of legal forms.
4. Transfer and store files.
5. Obtain materials of information from files.
6. Search for lost materials.
7. Initiate and maintain materials for tickler file.
8. Add supplements to law library.

J. PERFORMING ACCOUNTING AND FINANCIAL RECORD-KEEPING DUTIES

1. Collect fees for reporting depositions and court records.
2. Inspect checks for acceptability.
3. Maintain firm and client checkbook accounts.
4. Maintain income and expense records.
5. Prepare bank deposits.
6. Prepare office payroll.
7. Prepare tax withholding reports.
8. Reconcile bank statements.
9. Prepare and post petty cash vouchers.
10. Prepare and post check records.
11. Initiate and maintain client account records.
12. Prepare statements to clients.
13. Inspect invoices for accuracy.

CAREER PATHS

SECONDARY

12TH

Receptionist
Typist
Machine transcriber
  or
  Transcriptionist
Proofreader
Word processor
Mail clerk or
  Mail handler
Records clerk
Telephone or
  Switchboard operator
Billing clerk or
  Assistant
Runner
Duplicator clerk

POSTSECONDARY

13TH

Legal Assistant
Legal Secretary

14TH

Legal Administrator
Legal Secretary

RELATED ACADEMIC COMPETENCIES

DUTY AREA 1. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

1.1 Maintain professional conduct.
1.2 Identify procedures and considerations for producing work of satisfactory quality.
1.3 Identify the attitudes and work habits necessary for good staff relations in a legal office.
1.4 Participate in co-curricular professional organizations.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	1.1, 1.3
• Read with comprehension.	1.1, 1.2, 1.3, 1.4
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	1.3, 1.4
• Demonstrate critical thinking skills.	1.1, 1.2, 1.3, 1.4
• Demonstrate a sense of responsibility for participating in discussion.	1.1, 1.3, 1.4
• Take notes from written, oral, and audiovisual material.	1.1, 1.2, 1.3, 1.4
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	1.2, 1.4
• Interpret and verify numeric/data entries, including graphs and charts.	
• Give clear oral and written directions.	1.4
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	1.1, 1.4
• Follow multistep oral and written instructions.	1.2, 1.3, 1.4
• Communicate ideas, concepts, and opinions.	1.1, 1.2, 1.3, 1.4
• Complete forms with accuracy.	1.2
• Ask questions necessary to gain assistance and information.	1.1, 1.2, 1.4
• Use general and technical references.	1.1, 1.2, 1.4
• Demonstrate appropriate emotional response.	1.1, 1.3, 1.4
• Access and interpret electronic communications.	1.2, 1.4
• Read and interpret technical information.	1.2, 1.4

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	1.3
• Sequence numbers.	1.2
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate operations involving integers and rationals.	
• Use calculators.	
• Use estimation.	1.2
• Determine order of operations.	
• Use algebraic concepts to solve problems.	
• Relate fractions, decimals, and percents.	
• Communicate mathematical information.	1.1, 1.2, 1.4
• Optimize scheduling.	1.3, 1.4

*Based on locally derived occupational information

DUTY AREA	**COURSE**
1. DEVELOPING PERSONAL EMPLOYABILITY SKILLS	Secondary

TASK/COMPETENCY

1.1 Maintain professional conduct.

PERFORMANCE OBJECTIVE

P1.1 Given a checklist of characteristics that employers and co-workers value (such as dependability, honesty, tact, confidentiality, cooperativeness, good personal grooming, and good judgment), maintain professional conduct. Demonstration should be performed in accordance with instructor guidelines.

PERFORMANCE MEASURE

M1.1 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify appropriate conduct required on the job after listening to a professional (attorney/legal secretary) speak to class.
2. Define tact, confidentiality, and judgment.
3. Identify characteristics of a professional person.
4. List benefits of being professional when working on a job.
5. Practice displaying characteristics associated with professional conduct.

DUTY AREA	**COURSE**
1. DEVELOPING PERSONAL EMPLOYABILITY SKILLS	Secondary

TASK/COMPETENCY

1.2 Identify procedures and considerations for producing work of satisfactory quality.

PERFORMANCE OBJECTIVE

P1.2 Given simulated legal office assignments, identify procedures and considerations for producing work of satisfactory quality. Identifications must match those included on a class-developed master list and should include prioritizing work and editing/proofing documents.

PERFORMANCE MEASURE

M1.1 Written assignment; rated acceptable according to class-developed master list

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prioritize work according to due dates.
2. Perform work according to a logical sequence of tasks.
3. Schedule adequate time to complete each task.
4. Check accuracy of work while completing task.
5. Evaluate work for clarity and conciseness.

DUTY AREA **COURSE**
1. DEVELOPING PERSONAL EMPLOYABILITY SKILLS Secondary

TASK/COMPETENCY
1.3 Identify the attitudes and work habits necessary for good staff relations in a legal office.

PERFORMANCE OBJECTIVE
P1.3 Given a description of a legal office setting, identify the attitudes and work habits necessary for good staff relations, including strategies for handling responsibilities and for managing details and stress. Identification should be made in accordance with instructor checklist.

PERFORMANCE MEASURE
M1.3 Student-prepared checklist; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe traits that reflect a positive attitude when working with clients and when completing other office duties.
2. Identify factors associated with assignment of responsibilities.
3. Describe techniques for managing details in a thorough, pleasant, and accurate manner.
4. Examine ways to maintain a positive outlook when working under pressure.
5. Seek means to relieve attorneys and other legal personnel of time-consuming tasks.

DUTY AREA **COURSE**
1. DEVELOPING PERSONAL EMPLOYABILITY SKILLS Secondary

TASK/COMPETENCY
1.4 Participate in co-curricular professional organizations.

PERFORMANCE OBJECTIVE
P1.4 Given guidelines and necessary supplies, participate in co-curricular and/or professional organizations. Participation must take place in accordance with instructor guidelines.

PERFORMANCE MEASURE
M1.4 Oral report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define the purposes of the organization.
2. Engage in organizational activities, including individual and group projects.
3. Prepare for participation in regional and state contests and meetings.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 2. OBSERVING LEGAL OFFICE ETHICS

2.1 Identify procedures for maintaining confidentiality of client information.
2.2 Identify procedures for professional handling of client complaints.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	2.1, 2.2
• Read with comprehension.	2.1, 2.2
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	2.1, 2.2
• Demonstrate critical thinking skills.	2.1, 2.2
• Demonstrate a sense of responsibility for participating in discussion.	2.1, 2.2
• Take notes from written, oral, and audiovisual material.	2.1, 2.2
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	2.1
• Interpret and verify numeric/data entries, including graphs and charts.	
• Give clear oral and written directions.	2.1, 2.2
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	2.1
• Follow multistep oral and written instructions.	2.1, 2.2
• Communicate ideas, concepts, and opinions.	2.1, 2.2
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	2.1, 2.2
• Use general and technical references.	2.1, 2.2
• Demonstrate appropriate emotional response.	2.1, 2.2
• Access and interpret electronic communications.	
• Read and interpret technical information.	

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate operations involving integers and rationals.	
• Use calculators.	
• Use estimation.	2.1
• Determine order of operations.	
• Use algebraic concepts to solve problems.	
• Relate fractions, decimals, and percents.	
• Communicate mathematical information.	2.1
• Optimize scheduling.	

*Based on locally derived occupational information

DUTY AREA	**COURSE**
2. OBSERVING LEGAL OFFICE ETHICS	Secondary

TASK/COMPETENCY

2.1 Identify procedures for maintaining confidentiality of client information.

PERFORMANCE OBJECTIVE

P2.1 Given simulated office situations, identify procedures for maintaining confidentiality of client information according to instructor guidelines.

PERFORMANCE MEASURE

M2.1 Case study; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define ethics.
2. Explain why confidentiality of client information is important.
3. List problems that could occur if confidentiality of client information is not observed.
4. List at least ten guidelines to follow in using ethical practices in the legal office.
5. Role play or demonstrate through simulated situations confidentiality of client information in the office, with emphasis on the following:
    - Give client information only to attorney and other appropriate personnel, or file in client folder.
    - Do not leave client information in a place where it can be read by unauthorized personnel.
    - If questioned by phone or in person, do not divulge any information, even to client, without authorization from attorney or appropriate personnel.
    - Do not discuss client information with other staff members, unless authorized to do so.
6. Review copies of an official "Code of Ethics" for attorneys, legal secretaries, and legal assistants.

DUTY AREA	**COURSE**
2. OBSERVING LEGAL OFFICE ETHICS	Secondary

TASK/COMPETENCY

2.2 Identify elements for professional handling of client complaints.

PERFORMANCE OBJECTIVE

P2.2 Given a simulated office situation in which a client is displeased, identify elements for professional handling of client complaints, such as tact and discretion. Identification should be made according to instructor checklist.

PERFORMANCE MEASURE

M2.2 Role-play activity; evaluated according to instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe polite ways to listen to a client's complaint; e.g., if you have to respond, do so in a low tone.
2. Change topic of conversation if there is an opportune time.
3. Give no opinion about attorney, either personal or professional.
4. Illustrate problems that might occur if legal office employees criticize attorney when talking with clients.
5. Identify tactful ways to handle a complaining client, then role play.
6. Identify the merits of resolving any differences with attorney in private, where clients cannot overhear.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 3. PERFORMING RECEPTIONIST ACTIVITIES

3.1 Receive and record telephone messages.
3.2 Gather client information.
3.3 Greet clients or visitors.
3.4 Compile and maintain records of long distance telephone calls.
3.5 Place telephone calls.
3.6 Maintain a database of officers of the court, administrative agencies, and resource persons.
3.7 Screen telephone calls.
3.8 Maintain calendar and appointments.
3.9 Maintain inventory of office supplies.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9
• Read with comprehension.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	3.1, 3.2, 3.3, 3.5, 3.7, 3.8, 3.9
• Demonstrate critical thinking skills.	3.1, 3.2, 3.3, 3.5, 3.6, 3.7, 3.8, 3.9
• Demonstrate a sense of responsibility for participating in discussion.	3.1, 3.2, 3.3, 3.5, 3.7, 3.8, 3.9
• Take notes from written, oral, and audiovisual material.	3.1, 3.2, 3.3, 3.5, 3.7, 3.8, 3.9
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	
• Interpret and verify numeric/data entries, including graphs and charts.	3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9
• Give clear oral and written directions.	3.1, 3.2, 3.3, 3.5, 3.7, 3.8, 3.9
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	3.2
• Follow multistep oral and written instructions.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9
• Communicate ideas, concepts, and opinions.	3.1, 3.2, 3.3, 3.5, 3.7, 3.8, 3.9
• Complete forms with accuracy.	3.1, 3.2, 3.3, 3.4, 3.6, 3.7, 3.8, 3.9
• Ask questions necessary to gain assistance and information.	3.1, 3.2, 3.3, 3.5, 3.6, 3.7, 3.8, 3.9
• Use general and technical references.	3.1, 3.2, 3.3, 3.5, 3.6, 3.7, 3.8, 3.9
• Demonstrate appropriate emotional response.	3.1, 3.2, 3.3, 3.5, 3.7, 3.8
• Access and interpret electronic communications.	3.2, 3.3, 3.6, 3.8, 3.9
• Read and interpret technical information.	3.2, 3.3

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	3.9
• Use measures of central tendencies.	
• Round numbers.	3.9
• Use percent to solve problems.	3.9
• Interpret/make graphs and charts.	3.1, 3.4, 3.9
• Sequence numbers.	
• Perform and convert measurements.	3.9

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Find ratio and proportion.	
• Use formulas.	3.9
• Compute unit prices.	3.9
• Calculate operations involving integers and rationals.	
• Use calculators.	3.9
• Use estimation.	3.9
• Determine order of operations.	
• Use algebraic concepts to solve problems.	3.9
• Relate fractions, decimals, and percents.	3.9
• Communicate mathematical information.	3.1, 3.4, 3.5, 3.9
• Optimize scheduling.	3.1, 3.4, 3.5, 3.8

*Based on locally derived occupational information

DUTY AREA
3. PERFORMING RECEPTIONIST ACTIVITIES

COURSE
Secondary

TASK/COMPETENCY
3.1 Receive and record telephone messages.

PERFORMANCE OBJECTIVE
P3.1 Given simulated telephone calls, receive and record telephone messages. All telephone calls received and recorded should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M3.1 Role-play activity; evaluated according to instructor rating form.

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Illustrate steps to be followed in preparing telephone messages.
   - Keep a message pad and pencil close to the telephone.
   - Enter the following information on message form, as appropriate:
     person for whom call is intended
     date and hour call was received
     complete name of caller, organization, and telephone number
     other important information.
   - Sign name or initials.
2. Role play situations that require telephone messages to be prepared.

DUTY AREA
3. PERFORMING RECEPTIONIST ACTIVITIES

COURSE
Secondary

TASK/COMPETENCY
3.2 Gather client information.

PERFORMANCE OBJECTIVE
P3.2 Given client information and other legal documents, gather client information as needed for the employer's (attorney's) conference with the client by determining the purpose of the conference, placing information into database, and completing any required forms.

PERFORMANCE MEASURE
M3.2 Completed database entries and forms; all components to meet professional standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the material needed by an attorney for a client conference.
2. Explain why a legal secretary prepares information for a client conference prior to the conference.
3. Determine purpose of conference.
4. Key client information into database. If a record is not already available, create one with the following information:
   - client's name
   - names of other parties to action, if any
   - type of action.
5. Complete any required legal forms.
6. Compile and arrange needed information in folder.
7. Analyze the consequences of a legal secretary's failure to provide appropriate information to an attorney for a client conference.

DUTY AREA	COURSE
3. PERFORMING RECEPTIONIST ACTIVITIES	Secondary

TASK/COMPETENCY

3.3 Greet clients or visitors.

PERFORMANCE OBJECTIVE

P3.3 Given case situations, greet clients or visitors in a professional manner in accordance with instructor guidelines.

PERFORMANCE MEASURE

M3.3 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Role play appropriate procedures in greeting clients or visitors.
2. Check to see if client or visitor has appointment.
3. Determine purpose of visit.
4. Verify client's information in database.
5. Complete any required legal forms.
6. Compile and arrange needed information in folder.
7. Attend to client's comfort.

DUTY AREA	COURSE
3. PERFORMING RECEPTIONIST ACTIVITIES	Secondary

TASK/COMPETENCY

3.4 Maintain records of long distance telephone calls.

PERFORMANCE OBJECTIVE

P3.4 Given a list of telephone calls, maintain records of long distance calls according to instructor specifications.

PERFORMANCE MEASURE

M3.4 Telephone log; all items rated acceptable according to instructor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Keep the long distance log close to the telephone.
2. Enter the following information on the long distance log:
    - person for whom call is placed
    - date and hour call was placed
    - complete name of caller, organization, and telephone number.

DUTY AREA **COURSE**
3. PERFORMING RECEPTIONIST ACTIVITIES Secondary

TASK/COMPETENCY
3.5 Place telephone calls.

PERFORMANCE OBJECTIVE
P3.5 Given case situations and telephone numbers, place telephone calls. Calls should be placed in accordance with instructor guidelines.

PERFORMANCE MEASURE
M3.5 Role-play activity; evaluated as acceptable according to instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Dial appropriate number.
2. Request appropriate information or route to appropriate attorney.
3. Role-play situations that require telephone calls to be transferred.

DUTY AREA **COURSE**
3. PERFORMING RECEPTIONIST ACTIVITIES Secondary

TASK/COMPETENCY
3.6 Maintain a database of officers of the court, administrative agencies, and resource persons.

PERFORMANCE OBJECTIVE
P3.6 Given appropriate sources, maintain a database of officers of the court, administrative agencies, and resource persons. Database should be maintained in accordance with instructor checklist.

PERFORMANCE MEASURE
M3.6 Student-maintained database; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify organizations and individuals contacted on a regular basis.
2. Compile addresses and telephone numbers of organizations and individuals, including
    - courts, judges, and clerks
    - officers of federal, state, or local tax bureaus
    - legal associations
    - doctors, dentists, insurance brokers, accountants, and other professional people
    - attorney's or employer's home phone number and address
    - legal office supply firms
    - printers
    - other outside service firms frequently used.
3. Record the information in a database.

DUTY AREA **COURSE**
3. PERFORMING RECEPTIONIST ACTIVITIES Secondary

TASK/COMPETENCY
3.7 Screen telephone calls.

PERFORMANCE OBJECTIVE
P3.7 Given role-play situations, screen telephone calls to determine those that can be handled by a secretary and those that must be referred to an attorney or supervisor. Screening should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M3.7 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Establish specific policies with attorney or supervisor for handling phone calls.
2. Ask who is calling and purpose of call.
3. Answer routine questions briefly and concisely.
4. Route the call to appropriate person if matter requires attention of attorney or supervisor.

DUTY AREA **COURSE**
3. PERFORMING RECEPTIONIST ACTIVITIES Secondary

TASK/COMPETENCY
3.8 Maintain calendar and appointments.

PERFORMANCE OBJECTIVE
P3.8 Given simulated calls requesting new appointments, maintain calendar and appointments according to instructor's master calendar and appointment book. Rearrange attorney's calendar for appointment changes so there are no conflicts, and confirm changes with caller and attorney.

PERFORMANCE MEASURE
M3.8 Student-maintained calendar and appointment book; all items rated acceptable according to instructor's master calendar and appointment book

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of maintaining an accurate calendar.
2. Locate current appointment calendar.
3. Neatly indicate cancellation of appointment by drawing a line through it.
4. Determine desired date and time of new appointment.
5. Check calendar to see if new date and time are available; if unavailable, suggest alternate appointment.
6. Confirm new appointment with caller and with attorney.
7. Write new appointment on calendar and also on attorney's calendar.

DUTY AREA
3. PERFORMING RECEPTIONIST ACTIVITIES

COURSE
Secondary

TASK/COMPETENCY
3.9 Maintain inventory of office supplies.

PERFORMANCE OBJECTIVE
P3.9 Given a list of supplies on hand and a list of needed supplies, maintain inventory of office supplies by checking inventory list and ordering supplies accordingly.

PERFORMANCE MEASURE
M3.9 Student-maintained inventory list; all items rated acceptable as indicated on master list

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of maintaining and keeping supplies up to date.
2. Use appropriate forms for requisitioning and purchasing equipment.
3. Outline care and maintenance of equipment.
4. Identify procedures for maintaining inventory control.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 4. PERFORMING MAIL FUNCTIONS

4.1 Identify procedures for processing incoming mail.
4.2 Identify procedures for processing outgoing mail.
4.3 Select appropriate methods and services for mailing items that require special attention.
4.4 Prepare and transmit office correspondence and legal documents for telecommunication transmittal.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	4.1, 4.2, 4.3, 4.4
• Read with comprehension.	4.1, 4.2, 4.3, 4.4
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	4.1, 4.2, 4.3, 4.4
• Demonstrate critical thinking skills.	4.1, 4.2, 4.3, 4.4
• Demonstrate a sense of responsibility for participating in discussion.	4.1, 4.2, 4.3, 4.4
• Take notes from written, oral, and audiovisual material.	4.1, 4.2, 4.3, 4.4
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	
• Interpret and verify numeric/data entries, including graphs and charts.	4.1, 4.2, 4.3, 4.4
• Give clear oral and written directions.	4.1, 4.2, 4.3, 4.4
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	4.4
• Follow multistep oral and written instructions.	4.1, 4.2, 4.3, 4.4
• Communicate ideas, concepts, and opinions.	4.1, 4.2, 4.3, 4.4
• Complete forms with accuracy.	4.1, 4.2, 4.3, 4.4
• Ask questions necessary to gain assistance and information.	4.1, 4.2, 4.3, 4.4
• Use general and technical references.	4.1, 4.2, 4.3, 4.4
• Demonstrate appropriate emotional response.	
• Access and interpret electronic communications.	4.1, 4.2, 4.3, 4.4
• Read and interpret technical information.	4.1, 4.2, 4.3

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	4.3
• Interpret/make graphs and charts.	4.3, 4.4
• Sequence numbers.	
• Perform and convert measurements.	
• Find ratio and proportion.	4.2
• Use formulas.	4.2, 4.3
• Compute unit prices.	4.2, 4.3

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Calculate operations involving integers and rationals.	
• Use calculators.	4.2, 4.3
• Use estimation.	4.2, 4.3
• Determine order of operations.	
• Use algebraic concepts to solve problems.	
• Relate fractions, decimals, and percents.	4.3
• Communicate mathematical information.	4.4
• Optimize scheduling.	4.1, 4.2, 4.3

*Based on locally derived occupational information

DUTY AREA	**COURSE**
4. PERFORMING MAIL FUNCTIONS	Secondary

TASK/COMPETENCY
4.1 Identify procedures for processing incoming mail.

PERFORMANCE OBJECTIVE
P4.1 Given a simulated packet of incoming mail, including mail marked "confidential" or "personal," identify procedures for processing incoming mail – opening, dating, sorting, prioritizing, and distributing. Identification of procedures must match instructor guidelines.

PERFORMANCE MEASURE
M4.1 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of processing mail immediately after it is delivered.
2. List the types of equipment used to open mail.
3. Illustrate the various ways to sort mail.
4. Identify steps for processing mail.
    - Date the mail.
    - Check for enclosures.
    - Check for return address.
    - Annotate the correspondence.
    - Record the file notation.
5. List the steps for prioritizing mail.

DUTY AREA	**COURSE**
4. PERFORMING MAIL FUNCTIONS	Secondary

TASK/COMPETENCY
4.2 Identify procedures for processing outgoing mail.

PERFORMANCE OBJECTIVE
P4.2 Given a simulated packet of outgoing mail, identify procedures for processing outgoing mail which should include knowledge of zip and nine-digit zip codes and mailing options. Identification of procedures must match instructor guidelines.

PERFORMANCE MEASURE
M4.2 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain how zip and nine-digit zip codes help process mail more efficiently.
2. List the different types of mail services.
3. Identify the correct class for mail.
4. Explain the various methods for reducing costs of mail.
5. Illustrate the various ways to sort mail.
6. Identify steps for processing mail.
    - Date the mail.
    - Check for enclosures.
    - Check for return address.
    - Annotate the correspondence.
    - Record the file notation.
7. List the steps for prioritizing mail.

DUTY AREA
4. PERFORMING MAIL FUNCTIONS

COURSE
Secondary

TASK/COMPETENCY
4.3 Select appropriate methods and services for mailing items that require special attention.

PERFORMANCE OBJECTIVE
P4.3 Given items to mail needing special processing such as a registered letter with return receipt requested, a report that must reach its destination the next day, and 1,200 pieces of bulk mail, select appropriate methods and services for mailing items that require special attention. Selection should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M4.3 Student demonstration; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. List the classes of mail:
    - first-class mail
    - priority mail
    - second-class mail
    - third-class mail
    - fourth-class mail
    - mixed-classes of mail.

2. List postal services:
    - certificate of mailing
    - cash receipts
    - special delivery
    - special handling
    - insurance
    - collect on delivery (COD) mail
    - recall of mail
    - registered mail
    - certified mail
    - express mail
    - return receipts
    - mailgram service.

3. List other delivery services.

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DUTY AREA
4. PERFORMING MAIL FUNCTIONS

COURSE
Secondary

TASK/COMPETENCY

4.4 Prepare and transmit office correspondence and legal documents for telecommunication transmittal.

PERFORMANCE OBJECTIVE

P4.4 Given pieces of office correspondence and two legal documents, prepare and transmit office correspondence and legal documents for telecommunication transmittal according to instructor guidelines.

PERFORMANCE MEASURE

M4.4 Transmitted office correspondence and legal documents; all items rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define the following terms: telecommunication, electronic mail, voice mail, voice facsimile transmission, LAN, and modem.
2. Research and deliver oral report on ways of using telecommunication equipment.
3. Identify the various database services used in law offices.
4. Identify procedures for electronic transmission.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 5. MANAGING RECORDS

5.1 File documents alphanumerically, either manually or by using a computerized system.
5.2 File documents by subject, either manually or by using a computerized filing system.
5.3 Establish and maintain a tickler file, either manually or by using a computerized filing system.
5.4 Prepare records for new clients, either manually or by using a computerized filing system.
5.5 Update records for clients.
5.6 Establish and maintain a forms file.
5.7 Establish and maintain a reference manual.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Read with comprehension.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	5.2, 5.4, 5.5, 5.6, 5.7
• Demonstrate critical thinking skills.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Demonstrate a sense of responsibility for participating in discussion.	5.3, 5.4, 5.5, 5.6, 5.7
• Take notes from written, oral, and audiovisual material.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	5.1, 5.2, 5.3
• Interpret and verify numeric/data entries, including graphs and charts.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6
• Give clear oral and written directions.	
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	5.6
• Follow multistep oral and written instructions.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Communicate ideas, concepts, and opinions.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Complete forms with accuracy.	5.1, 5.2, 5.3, 5.4, 5.5
• Ask questions necessary to gain assistance and information.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Use general and technical references.	5.1, 5.2, 5.3, 5.6, 5.7
• Demonstrate appropriate emotional response.	5.4, 5.5
• Access and interpret electronic communications.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7
• Read and interpret technical information.	5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	5.5
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	5.1
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	5.5

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Calculate operations involving integers and rationals.	
• Use calculators.	5.5
• Use estimation.	
• Determine order of operations.	
• Use algebraic concepts to solve problems.	
• Relate fractions, decimals, and percents.	
• Communicate mathematical information.	5.3
• Optimize scheduling.	5.3

*Based on locally derived occupational information

DUTY AREA **COURSE**
5. MANAGING RECORDS Secondary

TASK/COMPETENCY
5.1 File documents alphanumerically, either manually or by using a computerized system.

PERFORMANCE OBJECTIVE
P5.1 Given documents, file documents alphanumerically, either manually or by using a computerized system. Documents must be coded, sorted, and filed according to instructor/ARMA specifications.

PERFORMANCE MEASURE
M5.1 Student-filed documents; all items rated acceptable according to instructor/ARMA specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Collect correspondence to be filed.
2. Inspect documents.
3. Assign numbers to each person, organization, or action with which attorney is dealing.
4. Develop corresponding files in which all names and cases are filed alphabetically.
5. Code each file with corresponding numbers of names and cases in numeric files.
6. Sort documents.
7. Store documents in appropriate numeric file and/or folders.
8. Key-enter a one-page report on the advantages/disadvantages of using an alphanumeric filing system in a legal office.

NOTE: If using a computerized system, be sure to back up the files.

DUTY AREA **COURSE**
5. MANAGING RECORDS Secondary

TASK/COMPETENCY
5.2 File documents by subject, either manually or by using a computerized filing system.

PERFORMANCE OBJECTIVE
P5.2 Given documents, file documents by subject, either manually or by using a computerized filing system. Documents must be filed according to instructor/ARMA specifications, to include inspecting, coding, and categorizing according to various topics pertinent to legal office.

PERFORMANCE MEASURE
M5.2 Documents filed by subject; all items rated acceptable according to instructor/ARMA specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Collect correspondence to be filed.
2. Inspect documents.
3. Code documents according to subject categories to be used.
4. Sort documents in alphabetical order according to subject.
5. Store documents in appropriate subject files.
6. Identify ways to categorize various topics in a legal office.

NOTE: If using a computerized filing system, be sure to back up the files.

DUTY AREA	COURSE
5. MANAGING RECORDS	Secondary

TASK/COMPETENCY

5.3 Establish and maintain a tickler file, either manually or by using a computerized filing system.

PERFORMANCE OBJECTIVE

P5.3 Given documents, establish and maintain a tickler file, either manually or by using a computerized filing system. This should include affixing tab inserts for days of the month, recording tasks to be performed, inserting information in files, maintaining updated files, and reminding people of responsibilities/due dates. Documents must be filed according to instructor/ARMA specifications.

PERFORMANCE MEASURE

M5.3 Student-maintained tickler file; all items rated acceptable according to instructor/ARMA specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare files/folders with inserts tabbed 1 through 31 for days of month, a set of folders tabbed by month, and a "next year" file/folder.
2. Record tasks to be performed on paper or computer files.
3. Insert paper or information outlining tasks in the files for the appropriate dates.
4. Delete or destroy papers or information after tasks are completed if they represent one-time activities.
5. Reinsert paper or information in next appropriate time file/folder if task is ongoing.
6. Remind people of their responsibilities and deadlines on appropriate dates.
7. Write short paragraphs on the advantages of using a tickler file.

NOTE: If using a computerized filing system, be sure to back up files.

DUTY AREA	COURSE
5. MANAGING RECORDS	Secondary

TASK/COMPETENCY

5.4 Prepare records for new clients, either manually or by using a computerized filing system.

PERFORMANCE OBJECTIVE

P5.4 Given necessary information, client record forms, and simulated interviews, prepare records for new clients, either manually or by using a computerized filing system. Preparation must match instructor guidelines which should include specifics of each client situation and the use of tact to obtain the information.

PERFORMANCE MEASURE

M5.4 Student-prepared records; all items rated acceptable on instructor-prepared checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Compile client information.
2. Key-enter the following information on client record form:
    - client's name in all caps
    - names of other parties to action, if any
    - type of action
    - name of court and action number assigned to case, if matter requires court action
    - each activity performed by attorney and time devoted to each.
3. Prepare files with appropriate label for client.
4. Explain or role play the characteristics and importance of using tact in obtaining essential information for new clients.

NOTE: If using a computerized filing system, be sure to back up the files.

DUTY AREA	COURSE
5. MANAGING RECORDS	Secondary

TASK/COMPETENCY
5.5 Update records for clients.

PERFORMANCE OBJECTIVE
P5.5 Given appropriate information and client records, update records for clients according to instructor guidelines.

PERFORMANCE MEASURE
M5.5 Updated client records; all items rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Compile new information.
2. Key-enter any changes in personal information, such as change of address or employment, on the record/file.
3. Post all information relating to legal action for the client as it occurs.
4. Record number of hours devoted to proceedings, expenses incurred by the client, and disbursements made on behalf of the client, as they occur.
5. Verify information for accuracy.
6. Transfer expenses and disbursements to appropriate account sheet.
7. Identify and record activities and steps involved in updating records for clients.

NOTE: If a computerized filing system is being used, be sure to back up files.

DUTY AREA	COURSE
5. MANAGING RECORDS	Secondary

TASK/COMPETENCY
5.6 Establish and maintain a forms file.

PERFORMANCE OBJECTIVE
P5.6 Given copies of legal documents, such as court documents, client documents, form letters, and memoranda, establish and maintain a forms file according to the instructor checklist.

PERFORMANCE MEASURE
M5.6 Forms file of legal documents; acceptable rating based on instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Separate documents by the following classifications:
    - client documents
    - non-court documents
    - court documents
    - letters
    - memoranda.
2. Assemble documents within each classification and place in alphabetical order, arranging legal documents by titles and letters and memoranda by appropriate subject headings.
3. Prepare file folder entitled "Forms."
4. Store documents in file.
5. Debate the importance of establishing and maintaining a forms file. Use attached checklist.

DUTY AREA	COURSE
5. MANAGING RECORDS	Secondary

FORMS FILE CHECKLIST

	YES	NO
1. Documents are separated according to the following classifications: • court documents • client documents • letters • memoranda	☐	☐
2. Documents are arranged in correct alphabetical order.	☐	☐
3. Documents are placed in file entitled "Forms."	☐	☐

DUTY AREA
5. MANAGING RECORDS

COURSE
Secondary

TASK/COMPETENCY
5.7 Establish and maintain a reference manual.

PERFORMANCE OBJECTIVE
P5.7 Given copies of legal office documents, such as organization of firm, firm policies, office duties and responsibilities, accounting procedures, production formats, equipment operations, supplies manuals, etc., establish and maintain a reference manual. Manual must be established and maintained according to instructor checklist.

PERFORMANCE MEASURE
M5.7 Reference manual for the legal office; acceptable rating based on instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Collect policies, rules, and other information for reference manual.
2. Arrange documents in alphabetical order by title and name identification.
3. Prepare file folder entitled "Reference Manual."
4. Store documents in manual.
5. Prepare a list of documents that should be included in a reference manual and explain why each is essential. Use attached checklist.

DUTY AREA	COURSE
5. MANAGING RECORDS	Secondary

REFERENCE FILE CHECKLIST

	YES	NO
1. Documents are separated according to the following classifications and order of importance:		
•. organization of firm	☐	☐
• firm procedures	☐	☐
• office duties and responsibilities	☐	☐
• accounting procedures	☐	☐
• production formats	☐	☐
• equipment operations	☐	☐
• supply manuals.	☐	☐
2. Documents are arranged in correct alphabetical order.	☐	☐
3. Documents are placed in file entitled "Reference."	☐	☐

RELATED ACADEMIC COMPETENCIES

DUTY AREA 6. MAINTAINING FINANCIAL RECORDS

6.1 Journalize business transactions in a combined cash journal and post to client ledger sheets.
6.2 Establish and replenish a petty cash fund.
6.3 Prepare a bank statement reconciliation.
6.4 Complete payroll records.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	6.1, 6.2, 6.3, 6.4
• Read with comprehension.	6.1, 6.2, 6.3, 6.4
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	6.4
• Demonstrate critical thinking skills.	6.1, 6.2, 6.3, 6.4
• Demonstrate a sense of responsibility for participating in discussion.	6.3, 6.4
• Take notes from written, oral, and audiovisual material.	6.1, 6.2, 6.3, 6.4
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	
• Interpret and verify numeric/data entries, including graphs and charts.	6.1, 6.2, 6.3, 6.4
• Give clear oral and written directions.	6.3
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	6.2, 6.3, 6.4
• Follow multistep oral and written instructions.	6.1, 6.2, 6.3, 6.4
• Communicate ideas, concepts, and opinions.	6.1, 6.2, 6.3, 6.4
• Complete forms with accuracy.	6.1, 6.2, 6.3, 6.4
• Ask questions necessary to gain assistance and information.	6.1, 6.2, 6.3, 6.4
• Use general and technical references.	6.1, 6.3, 6.4
• Demonstrate appropriate emotional response.	
• Access and interpret electronic communications.	6.1, 6.2, 6.3, 6.4
• Read and interpret technical information.	6.1, 6.2, 6.3, 6.4

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	6.1, 6.2, 6.3, 6.4
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	6.1, 6.2, 6.4
• Interpret/make graphs and charts.	6.2, 6.4
• Sequence numbers.	6.1, 6.2, 6.3
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	6.3, 6.4
• Compute unit prices.	6.4

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Calculate operations involving integers and rationals.	6.2, 6.3, 6.4
• Use calculators.	6.1, 6.2, 6.3, 6.4
• Use estimation.	
• Determine order of operations.	
• Use algebraic concepts to solve problems.	6.1, 6.4
• Relate fractions, decimals, and percents.	6.4
• Communicate mathematical information.	6.1, 6.2, 6.4
• Optimize scheduling.	6.1

*Based on locally derived occupational information

DUTY AREA **COURSE**
6. MAINTAINING FINANCIAL RECORDS Secondary

TASK/COMPETENCY
6.1 Journalize business transactions in a combined cash journal and post to client ledger sheets.

PERFORMANCE OBJECTIVE
P6.1 Given selected business transactions, journals, and ledgers, journalize business transactions in a combined cash journal and post to client ledger sheets. Transactions must be journalized according to instructor guidelines and totals must be balanced.

PERFORMANCE MEASURE
M6.1 Journalized transactions and posted entries; rated acceptable with totals balanced according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Journalize business transactions in a combined cash journal.
2. Prove equality of debits and credits.
3. Initiate and maintain client account records.
4. Post from the journal to client ledger sheets.
5. Prepare statements to clients.

DUTY AREA **COURSE**
6. MAINTAINING FINANCIAL RECORDS Secondary

TASK/COMPETENCY
6.2 Establish and replenish a petty cash fund.

PERFORMANCE OBJECTIVE
P6.2 Given necessary data and proper forms, establlish and replenish a petty cash fund, using a cash pay ments journal in accordance with instructor guidelines.

PERFORMANCE MEASURE
M6.2 Petty cash fund transactions; rated acceptable according to criteria in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define terms related to a petty cash fund.
2. Establish a petty cash fund, using a voucher system.
3. Record petty cash fund payments in a petty cash record.
4. Prepare a voucher to replenish a petty cash fund.
5. Determine if a petty cash fund is short or over.
6. Journalize necessary transactions related to establishing and replenishing petty cash.

DUTY AREA	COURSE
6. MAINTAINING FINANCIAL RECORDS	Secondary

TASK/COMPETENCY

6.3 Prepare a bank statement reconciliation.

PERFORMANCE OBJECTIVE

P6.3 Given procedure for reconciliation, a bank statement, and necessary data, prepare a bank statement reconciliation according to instructor guidelines. Guidelines should include knowledge of terms, concepts, and practices related to checking accounts as well as procedures with forms, statements, posting, and preparing deposits.

PERFORMANCE MEASURE

M6.3 Bank statement reconciliation; rated acceptable according to criteria in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms related to checking accounts.
2. Review concepts and practices related to checking accounts.
3. Prepare checks and selected business forms related to a checking account.
4. Review procedures for reconciling bank statement with check register.
5. Prepare and post check records.
6. Prepare bank deposits.

DUTY AREA	COURSE
6. MAINTAINING FINANCIAL RECORDS	Secondary

TASK/COMPETENCY

6.4 Complete payroll records.

PERFORMANCE OBJECTIVE

P6.4 Given time cards, company policy for computing hours, employee wage information, and proper forms, complete payroll records by preparing payroll register and an employee's earnings record according to instructor guidelines.

PERFORMANCE MEASURE

M6.4 Recorded payroll register and employee's earnings; rated acceptable according to criteria in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms related to employee earnings.
2. Review various wages and salary plans and identify the differences.
3. Complete Form W4.
4. Analyze a payroll time card and calculate total earnings.
5. Review the difference between gross earnings and net pay.
6. Identify various deductions that could affect a person's paycheck.
7. Record employee information and earnings on a payroll register.
8. Calculate deductions for federal and state income tax, FICA tax, and other deductions.
9. Calculate net pay.
10. Total, prove, and rule payroll register.
11. Prepare payroll checks.
12. Record information from payroll register to employee's earnings record.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 7. PROCESSING CORRESPONDENCE

7.1 Use a word processing program to edit and correct errors in business correspondence.
7.2 Use correct legal and Latin terms as they occur in written or oral work.
7.3 Find and correct spelling and/or word-division errors in legal documents.
7.4 Prepare mailable business letters in legal format from handwritten, rough-draft copy, and from dictation.
7.5 Prepare mailable business letters with special features from handwritten, rough-draft copy, and from dictation.
7.6 Prepare a short memorandum in specified format from handwritten, rough-draft copy, or from dictation.
7.7 Compose and prepare simple business correspondence.
7.8 Edit and revise legal correspondence for accuracy of content, clarity of expression, and appropriateness of style.
7.9 Transcribe letters and documents from recorded dictation, using a word processing program.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	7.1, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Read with comprehension.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	7.2, 7.4, 7.5, 7.6, 7.7, 7.9
• Demonstrate critical thinking skills.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Demonstrate a sense of responsibility for participating in discussion.	7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.9
• Take notes from written, oral, and audiovisual material.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Interpret and verify numeric/data entries, including graphs and charts.	7.1, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Give clear oral and written directions.	7.2, 7.4, 7.5, 7.6, 7.7
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Follow multistep oral and written instructions.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Communicate ideas, concepts, and opinions.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Use general and technical references.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Demonstrate appropriate emotional response.	7.7, 7.9
• Access and interpret electronic communications.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9
• Read and interpret technical information.	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	
• Perform and convert measurements.	7.4, 7.5, 7.6
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Calculate operations involving integers and rationals.	
• Use calculators.	
• Use estimation.	
• Determine order of operations.	
• Use algebraic concepts to solve problems.	
• Relate fractions, decimals, and percents.	
• Communicate mathematical information.	7.7, 7.8
• Optimize scheduling.	7.7

*Based on locally derived occupational information

DUTY AREA
7. PROCESSING CORRESPONDENCE

COURSE
Secondary

TASK/COMPETENCY
7.1 Use a word processing program to edit and correct errors in business correspondence.

PERFORMANCE OBJECTIVE
P7.1 Given pieces of correspondence, use a word processing program to edit and correct errors in business correspondence. All correspondence must meet mailability standards.

PERFORMANCE MEASURE
M7.1 Business correspondence; all correspondence rated acceptable according to mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Review safety, maintenance, and basic computer applications.
2. Review special features in word processing program to edit and correct errors in copy.
3. Practice using the features in Steps 1 and 2 using a computer.
4. Key-enter various types of legal correspondence, using word processing editing features.
5. Print and duplicate final copy.

DUTY AREA
7. PROCESSING CORRESPONDENCE

COURSE
Secondary

TASK/COMPETENCY
7.2 Use correct legal and Latin terms as they occur in written or oral work.

PERFORMANCE OBJECTIVE
P7.2 Given written and oral class assignments, use correct legal and Latin terms as they occur in written or oral work in accordance with instructor guidelines.

PERFORMANCE MEASURE
M7.2 Written and oral test; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify and define legal and Latin terms as they occur in the text.
2. Compose sentences using these legal and Latin terms.
3. Unscramble letters to form word.
4. Design a word game, using legal and Latin terms and their definitions.
5. Prepare short oral presentations for the class using legal and Latin terms used in the text.
6. Maintain a legal and Latin terminology notebook.

DUTY AREA	**COURSE**
7. PROCESSING CORRESPONDENCE	Secondary

TASK/COMPETENCY

7.3 Correct spelling and/or word-division errors in legal documents.

PERFORMANCE OBJECTIVE

P7.3 Given legal documents containing errors, find and correct spelling and/or word-division errors in legal documents in accordance with instructor guidelines.

PERFORMANCE MEASURE

M7.3 Corrected legal document; rated acceptable according to criteria in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Review proofreaders' marks and word-division rules.
2. Proofread and locate errors in legal document.
3. Edit documents by writing the correct words and/or word-divisions above those that are incorrect.
4. Check work for accuracy.
5. Key-enter documents, print, and duplicate final copy.

DUTY AREA	**COURSE**
7. PROCESSING CORRESPONDENCE	Secondary

TASK/COMPETENCY

7.4 Prepare mailable letters in legal format from handwritten, rough-draft copy, and from dictation.

PERFORMANCE OBJECTIVE

P7.4 Given letters, prepare mailable letters in legal format from handwritten, rough-draft copy, and from dictation. Letters must be prepared by making corrections in typing, grammar, punctuation, and capitalization. Any changes in wording must preserve the originally intended meaning.

PERFORMANCE MEASURE

M7.4 Mailable letters; rated acceptable according to criteria for mailability

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Review procedures for use of transcription equipment.
2. Review style rules for typing letters.
3. Outline standards a letter must meet to be considered mailable.
4. Prepare copy and follow these guidelines for legal format:
    - Introduce a series of related statements with a short, introductory paragraph closed with a colon.
    - Close different sections within the body of the letter with semicolons and the final section with a period.
    - Use commas, as required by text.
    - Use proper capitalization.
    - Follow proper rules for paragraph formation.
5. Balance letters vertically and horizontally.
6. Proofread and correct any errors.
7. Review procedures for typing from a rough-draft copy.
8. Prepare mailable letters from rough-draft copies of letters.
9. Read handwritten copy or listen to dictation.
10. Prepare mailable letters from dictated material.
11. Prepare a bulletin board display of model letters.

DUTY AREA	**COURSE**
7. PROCESSING CORRESPONDENCE	Secondary

TASK/COMPETENCY

7.5 Prepare mailable business letters with special features from handwritten, rough-draft copy, and from dictation.

PERFORMANCE OBJECTIVE

P7.5 Given business letters, prepare mailable business letters with special features from handwritten, rough-draft copy, and from dictation according to mailability standards.

PERFORMANCE MEASURE

M7.5 Business letters with special features; rated acceptable according to criteria for mailability

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Read handwritten copy, rough-draft copy, or listen to dictation.
2. Prepare copy and follow these guidelines for legal format:
   - Introduce a series of related statements with a short, introductory paragraph closed with a colon.
   - Close different sections within the body of the letter with semicolons and the final section with a period.
   - Use commas, as required by text.
   - Use proper capitalization.
   - Follow proper rules for paragraph formation.
3. Balance letter vertically and horizontally.
4. Prepare each letter in specified format, using appropriate spacing and punctuation for special features.
5. Proofread and correct errors.

DUTY AREA	**COURSE**
7. PROCESSING CORRESPONDENCE	Secondary

TASK/COMPETENCY

7.6 Prepare a short memorandum in specified format from handwritten, rough-draft copy or from dictation.

PERFORMANCE OBJECTIVE

P7.6 Given notes and memos, prepare a short memorandum in specified format from handwritten, rough-draft copy, or dictation according to mailability standards.

PERFORMANCE MEASURE

M7.6 Short memorandum; rated acceptable according to criteria for mailability

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Review the differences between a letter and a memorandum.
2. Review the steps in typing a memorandum in the correct form by viewing transparencies illustrating several examples of legal memorandums.
3. Read handwritten, rough-draft copy, or listen to dictation.
4. Type memorandum in specified format.
5. Balance memorandum vertically and horizontally.
6. Proofread and correct errors.
7. Prepare work to be displayed on a bulletin board.

DUTY AREA	COURSE
7. PROCESSING CORRESPONDENCE	Secondary

TASK/COMPETENCY

7.7 Prepare simple business correspondence.

PERFORMANCE OBJECTIVE

P7.7 Given appropriate information, compose and prepare simple business correspondence according to criteria for mailability and the individual style designated by attorney or supervisor.

PERFORMANCE MEASURE

M7.7 Simple business correspondence; rated acceptable according to criteria for mailability and attorney/supervisor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Review information that should be included in an appointment letter and basic rules for composing business letters and memorandums.
2. Compile client information or other appropriate information.
3. Prepare letters and memorandums in style designated by attorney or supervisor.
4. Include the following in the appointment letter:
   - date and time of appointment
   - place of appointment
   - name of attorney with whom the appointment is scheduled
   - purpose of appointment.
5. Individually or as teams, compose letters and memorandums appropriate for given situations in legal offices. Identify strengths and weaknesses of the letters.
6. Proofread letters and memorandums for correct spelling, punctuation, word division, and clarity of sentences.
7. Correct all errors.
8. Evaluate letters and memorandums, using a checklist.

DUTY AREA	COURSE
7. PROCESSING CORRESPONDENCE	Secondary

TASK/COMPETENCY

7.8 Edit legal correspondence for accuracy of content, clarity of expression, and appropriateness of style.

PERFORMANCE OBJECTIVE

P7.8 Given typewritten, rough-draft pieces of legal correspondence and source materials, edit legal correspondence for accuracy of content, clarity of expression, and appropriateness of style according to mailability standards.

PERFORMANCE MEASURE

M7.8 Edited correspondence; rated acceptable according to mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Read given correspondence that contains unclear sentences and verify factual accuracy by comparing to source information.
2. Rewrite and edit sentences that are unclear or awkward, using proofreader's marks.
3. Check correspondence for correct legal spacing and punctuation.
4. Key-enter correspondence in correct format.
5. Proofread work for accuracy, and correct any errors.
6. Key-enter, print, and duplicate final copy.

DUTY AREA
7. PROCESSING CORRESPONDENCE

COURSE
Secondary

TASK/COMPETENCY
7.9 Transcribe letters and documents from recorded dictation, using a word processing program.

PERFORMANCE OBJECTIVE
P7.9 Given material and recorded dictation, transcribe letters and documents from recorded dictation, using a word processing program, according to mailability standards.

PERFORMANCE MEASURES
M7.9 Transcribed letters and documents; rated acceptable according to criteria for mailability

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Review procedures for use of transcription equipment, and discuss criteria for a mailable letter or an acceptable legal document.
2. Review letter styles and formats for letters, memorandums, and legal documents.
3. Listen to recorded material to determine corrections in dictation noted by dictator.
4. Listen to a portion of the recorded dictation, and transcribe at computer using a word processing program. If dictation is unclear, back up and replay it.
5. Transcribe dictation, using designated letter style and placement for legal document.
6. Use correct spelling, punctuation, and/or word division. Use the correct word processing feature to assist in proofreading, editing, and correcting errors.
7. Proofread and correct any errors after all dictation has been transcribed.
8. Evaluate material typed by others, identifying any inaccuracies or noticeable corrections.
9. Duplicate all final copies for filing and/or presentation.
10. Research and write an essay entitled "Recorded Dictation vs. Oral (Shorthand) Dictation."

RELATED ACADEMIC COMPETENCIES

DUTY AREA 8. PREPARING NONLITIGATION DOCUMENTS

8.1 Key-enter a legal sales contract.
8.2 Key-enter a deed on a printed form.
8.3 Key-enter a power of attorney.
8.4 Key-enter a special power of attorney.
8.5 Key-enter a valid will.
8.6 Key-enter agreements, using legal cap and prepared forms.
8.7 Key-enter legal documents from various specialized areas.
8.8 Key-enter codicils to a valid will.
8.9 Key-enter an affidavit.
8.10 Key-enter a legal document containing an acknowledgment.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Read with comprehension.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	
• Demonstrate critical thinking skills.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Demonstrate a sense of responsibility for participating in discussion.	
• Take notes from written, oral, and audiovisual material.	
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Interpret and verify numeric/data entries, including graphs and charts.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Give clear oral and written directions.	
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Follow multistep oral and written instructions.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Communicate ideas, concepts, and opinions.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Complete forms with accuracy.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Ask questions necessary to gain assistance and information.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Use general and technical references.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Demonstrate appropriate emotional response.	
• Access and interpret electronic communications.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10
• Read and interpret technical information.	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	

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MATH COMPETENCY*

- Calculate operations involving integers and rationals.
- Use calculators.
- Use estimation.
- Determine order of operations.
- Use algebraic concepts to solve problems.
- Relate fractions, decimals, and percents.
- Communicate mathematical information.
- Optimize scheduling.

*Based on locally derived occupational information

TECHNICAL COMPETENCY

DUTY AREA	**COURSE**
8. PREPARING NONLITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY
8.1 Key-enter a legal sales contract.

PERFORMANCE OBJECTIVE
P8.1 Given a pre-printed bill of sale and necessary information, key-enter a legal sales contract according to instructor/legal guidelines.

PERFORMANCE MEASURE
M8.1 Student-keyed legal sales contract; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original and copies for county clerk, purchaser, seller, and office files.
2. Insert form in typewriter, with proper alignment.
3. Key-enter all necessary information in appropriate spaces.
4. Proofread and note any errors.
5. Prepare another contract if any errors occur, as erasures will void bills of sale.
6. Locate errors on the screen and correct them if a word processor is used.

DUTY AREA	**COURSE**
8. PREPARING NONLITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY
8.2 Key-enter a deed on a printed form.

PERFORMANCE OBJECTIVE
P8.2 Given appropriate information and a deed form, key-enter a deed on a printed form according to instructor/legal guidelines.

PERFORMANCE MEASURE
M8.2 Deed keyed on printed form; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original form and appropriate copies.
2. Insert form in typewriter with all items properly aligned.
3. Key-enter all information in appropriate spaces.
4. Proofread documents, checking for correct spelling of names and accuracy of land description.
5. Correct any errors.

DUTY AREA	**COURSE**
8. PREPARING NONLITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY
8.3 Key-enter a power of attorney.

PERFORMANCE OBJECTIVE
P8.3 Given necessary information, key-enter a power of attorney according to instructor/legal guidelines.

PERFORMANCE MEASURE
M8.3 Student-keyed power of attorney; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter in legal manuscript style, including
   - title in solid caps
   - introductory clause in solid caps, followed by colon
   - double spacing of body and acknowledgment
   - on fourth line below body, signature line with principal's name to the right, signature line with attorney's name and address underneath, and signature line for notary public at left.
3. Proofread document and neatly correct any errors, except names and amounts, which should not be erased. If errors occur on these, retype, unless a word processor is used.
4. If a word processor is used, locate and correct errors on the screen.

DUTY AREA	**COURSE**
8. PREPARING NONLITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY
8.4 Key-enter a special power of attorney.

PERFORMANCE OBJECTIVE
8.4 Given necessary information, key-enter a special power of attorney according to instructor/legal guidelines.

PERFORMANCE MEASURE
M8.4 Student-keyed special power of attorney; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter all information, including
   - name of person being granted special power of attorney
   - explanation of specifics – right, single-spaced
   - below power of attorney, the signature line for person giving power of attorney, a signature line with attorney's name and address underneath, and a signature line for notary public at left.
3. Proofread document and neatly correct any errors, except names and amounts which should not be erased. If errors occur on these, retype, unless a word processor is used.
4. If a word processor is used, locate and correct errors on the screen.

DUTY AREA **COURSE**

8. PREPARING NONLITIGATION DOCUMENTS Secondary

TASK/COMPETENCY

8.5 Key-enter a valid will.

PERFORMANCE OBJECTIVE

P8.5 Given necessary information, key-enter a valid will according to instructor/legal guidelines.

PERFORMANCE MEASURE

M8.5 Student-keyed valid will; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original for client and copy for office files.
2. Key-enter all necessary information in proper style, with
   - title in solid caps, double-spaced, one and one-half inch from top of page
   - body double-spaced
   - items in solid caps, centered
   - signature line, with testator's or testatrix's name underneath
   - signature lines and addresses for witnesses
   - page numbers.
3. Proofread documents and neatly correct any errors, with the exception of names and amounts, which should not be erased. If errors occur on these documents, retype, unless a word processor is used.
4. If a word processor is used, locate and correct errors on the screen.

DUTY AREA **COURSE**

8. PREPARING NONLITIGATION DOCUMENTS Secondary

TASK/COMPETENCY

8.6 Key-enter agreements, using legal cap and prepared forms.

PERFORMANCE OBJECTIVE

P8.6 Given necessary information, key-enter agreements, using legal cap and prepared forms according to instructor/legal guidelines.

PERFORMANCE MEASURE

M8.6 Student-keyed agreements; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original for grantee, one copy for grantor, and one copy for office files.
2. If using legal cap, key-enter in legal format, including
   - title in solid caps
   - names of parties in solid caps
   - first few words of beginning paragraphs in solid caps
   - word "Witnesseth" in solid caps, followed by a colon
   - each condition numbered separately
   - signature lines for parties and witnesses, if applicable.
3. Include proper alignment of each item and all necessary information that is mentioned above if using prepared forms.
4. Proofread documents and neatly correct any errors, except names and amounts which should not be erased. If errors occur on these documents, retype, unless a word processor is used.
5. If a word processor is used, locate and correct errors on the screen.

BEST COPY AVAILABLE

DUTY AREA	**COURSE**
8. PREPARING NONLITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY

8.7 Key-enter legal documents from various specialized areas.

PERFORMANCE OBJECTIVE

P8.7 Given source material from specialized areas, such as real estate or litigation, key-enter legal documents from various specialized areas according to instructor/legal guidelines.

PERFORMANCE MEASURE

M8.7 Student-keyed legal documents from specialized areas; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Compile information.
2. Prepare original and appropriate copies.
3. Key-enter documents, as appropriate for specialized area.
4. Proofread documents and correct any errors.

DUTY AREA	**COURSE**
8. PREPARING NONLITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY

8.8 Key-enter codicils to a valid will.

PERFORMANCE OBJECTIVE

P8.8 Given the necessary information and a typewritten will, key-enter codicils to a valid will according to instructor/legal guidelines.

PERFORMANCE MEASURE

M8.8 Student-keyed codicils; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original for client and copy for office files.
2. Key-enter codicil in legal manuscript style, including
    - standard rules for margins, paragraph indentions, and spacing between lines
    - heading in solid caps and centered
    - signature line, with name of testator or testatrix underneath
    - attestation clause, with signature and address lines for three witnesses
    - signature line, with attorney's name and address.
3. Proofread document and correct any errors, except names and amounts which should not be erased. If errors occur on these documents, retype, unless a word processor is used.
4. If a word processor is used, locate and correct errors on the screen.

DUTY AREA **COURSE**
8. PREPARING NONLITIGATION DOCUMENTS Secondary

TASK/COMPETENCY
8.9 Key-enter an affidavit.

PERFORMANCE OBJECTIVE
P8.9 Given a case description and affidavit form, key-enter an affidavit according to instructor/legal guidelines.

PERFORMANCE MEASURE
M8.9 Student-keyed affidavit; rated acceptable according to criteria in instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Compile information from case description.
2. Prepare an original and copies for opposing counsel and office files.
3. Key-enter information, as required.
4. Prepare copies from rough draft.
5. Proofread and neatly correct any errors, except for names and amounts which should not be erased. If errors occur in these, retype, unless word processing equipment is available.
6. If word processing equipment is used, locate errors on screen and correct them.

DUTY AREA **COURSE**
8. PREPARING NONLITIGATION DOCUMENTS Secondary

TASK/COMPETENCY
8.10 Key-enter a legal document containing an acknowledgment.

PERFORMANCE OBJECTIVE
P8.10 Given necessary information, key-enter a legal document containing an acknowledgment according to instructor/legal guidelines.

PERFORMANCE MEASURE
M8.10 Student-keyed legal document containing an acknowledgment; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Key-enter a legal document.
2. Key-enter acknowledgment clause below signature on legal document, including
   - a statement of venue
   - a statement of purpose of acknowledgment and the capacity of the signing party or parties
   - a testimonium clause to precede the notary's signature in states where required
   - signature line for notary.
3. Proofread document and neatly correct any errors.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 9. PREPARING LITIGATION DOCUMENTS

9.1 Key-enter complaints (Motions for Judgment) and summons, using legal cap and printed forms.
9.2 Key-enter interrogatories on legal cap, using correct format and style.
9.3 Key-enter subpoenas, using printed forms.
9.4 Key-enter motions and orders.
9.5 Key-enter a stipulation.
9.6 Key-enter a verification.
9.7 Key-enter a motion to transfer venue.
9.8 Key-enter a brief.
9.9 Key-enter a counterclaim.
9.10 Key-enter a deposition.
9.11 Key-enter pleadings and discovery.
9.12 Key-enter papers for bankruptcy.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Read with comprehension.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Demonstrate critical thinking skills.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Demonstrate a sense of responsibility for participating in discussion.	9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Take notes from written, oral, and audiovisual material.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Interpret and verify numeric/data entries, including graphs and charts.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Give clear oral and written directions.	
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Follow multistep oral and written instructions.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Communicate ideas, concepts, and opinions.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Complete forms with accuracy.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Ask questions necessary to gain assistance and information.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Use general and technical references.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Demonstrate appropriate emotional response.	
• Access and interpret electronic communications.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12
• Read and interpret technical information.	9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7, 9.8, 9.9, 9.10, 9.11, 9.12

MATH COMPETENCY*

- Perform basic operations using whole numbers, fractions, and decimals.
- Use measures of central tendencies.
- Round numbers.
- Use percent to solve problems.
- Interpret/make graphs and charts.
- Sequence numbers.
- Perform and convert measurements.
- Find ratio and proportion.
- Use formulas.
- Compute unit prices.
- Calculate operations involving integers and rationals.
- Use calculators.
- Use estimation.
- Determine order of operations.
- Use algebraic concepts to solve problems.
- Relate fractions, decimals, and percents.
- Communicate mathematical information.
- Optimize scheduling.

*Based on locally derived occupational information

TECHNICAL COMPETENCY

DUTY AREA **COURSE**
9. PREPARING LITIGATION DOCUMENTS Secondary

TASK/COMPETENCY
9.1 Key-enter complaints (Motions for Judgment) and summons, using legal cap and printed forms.

PERFORMANCE OBJECTIVE
P9.1 Given source material, legal cap, and printed forms, key-enter complaints (Motions for Judgment) and summons using legal cap and printed forms according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.1 Student-keyed complaint (Motions for Judgment) and summons, using legal cap and printed forms; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original, one copy for each defendant, and one copy for office files.
2. Follow standard rules for margins, indentions, and spacing between lines if key-entering on legal cap.
3. Include all parts of complaint (Motion of Judgment) and follow rules for key-entering, including
    - caption in solid caps
    - numbering of causes of action
    - numbering of allegations
    - signature line, with attorney's name and "Attorney for Plaintiff" underneath.
4. Key-enter summons in appropriate format including
    - name of plaintiff in caps
    - name of defendant in caps
    - index number
    - name of designated place of trial
    - basis of venue
    - plaintiff's address
    - statement of summons
    - name of attorney for plaintiff.
5. Key-enter all information not included on forms if using printed forms.
6. Proofread documents and neatly correct any errors.

DUTY AREA **COURSE**
9. PREPARING LITIGATION DOCUMENTS Secondary

TASK/COMPETENCY
9.2 Key-enter interrogatories on legal cap, using correct format and style.

PERFORMANCE OBJECTIVE
P9.2 Given necessary information and legal cap, key-enter interrogatories on legal cap using correct format and style according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.2 Student-keyed interrogatories; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original and appropriate copies.
2. Key-enter documents in legal format, including:
    - name of court in all caps
    - name of plaintiffs, et al, in all caps
    - name of defendants, et al, in all caps
    - index number
    - questions numbered and double spaced between.
3. Proofread documents and and make any necessary corrections.

DUTY AREA	**COURSE**
9. PREPARING LITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY

9.3 Key-enter subpoenas, using printed forms.

PERFORMANCE OBJECTIVE

P9.3 Given necessary information and printed forms, key-enter a subpoena, using printed forms according to instructor/legal guidelines.

PERFORMANCE MEASURE

M9.3 Student-keyed subpoena using printed forms; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare an original and copies for sheriff and office files.
2. Key-enter the necessary information, including:
    - name and address of attorney requesting appearance
    - title of case
    - name and address of party being subpoenaed
    - name of party on whose behalf witness is to testify and designation of party as plaintiff or defendant.
3. Proofread documents and neatly correct any errors.

DUTY AREA	**COURSE**
9. PREPARING LITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY

9.4 Key-enter motions and orders.

PERFORMANCE OBJECTIVE

P9.4 Given source material, legal cap, and printed forms, key-enter motions and orders according to instructor/legal guidelines.

PERFORMANCE MEASURE

M9.4 Student-keyed motions and orders; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal standards.
3. Proofread documents and make any necessary corrections.
4. Review the importance of motions and orders in litigation cases.

DUTY AREA — **COURSE**

9. PREPARING LITIGATION DOCUMENTS — Secondary

TASK/COMPETENCY

9.5 Key-enter a stipulation.

PERFORMANCE OBJECTIVE

P9.5 Given source materials, legal cap, and printed forms, key-enter a stipulation according to instructor/legal guidelines.

PERFORMANCE MEASURE

M9.5 Student-keyed stipulation; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal guidelines.
3. Proofread documents and make any necessary corrections.
4. Review the importance of stipulations in litigation cases.

DUTY AREA — **COURSE**

9. PREPARING LITIGATION DOCUMENTS — Secondary

TASK/COMPETENCY

9.6 Key-enter a verification.

PERFORMANCE OBJECTIVE

P9.6 Given source material, legal cap, and printed forms, key-enter a verification according to instructor/legal guidelines.

PERFORMANCE MEASURE

M9.6 Student-keyed verification; all items rated acceptable according to criteria in instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal guidelines.
3. Proofread documents and make any necessary corrections.
4. Review the importance of verifications in litigation cases.

DUTY AREA **COURSE**
9. PREPARING LITIGATION DOCUMENTS Secondary

TASK/COMPETENCY
9.7 Key-enter a motion to transfer venue.

PERFORMANCE OBJECTIVE
P9.7 Given source material, legal cap, and printed forms, key-enter a motion to transfer venue according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.7 Student-keyed motion to transfer; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal guidelines.
3. Proofread documents and make any necessary corrections.
4. Review the importance of motion to transfer venue in litigation cases.
5. Identify well-known cases in which transfer of venue was necessary.

DUTY AREA **COURSE**
9. PREPARING LITIGATION DOCUMENTS Secondary

TASK/COMPETENCY
9.8 Key-enter a brief.

PERFORMANCE OBJECTIVE
P9.8 Given source material, legal cap, and printed forms, key-enter a brief according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.8 Student-keyed brief; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal standards.
3. Proofread documents and make any necessary corrections.
4. Review the importance of establishing a brief for litigation cases.

DUTY AREA
9. PREPARING LITIGATION DOCUMENTS

COURSE
Secondary

TASK/COMPETENCY
9.9 Key-enter a counterclaim.

PERFORMANCE OBJECTIVE
P9.9 Given source material, legal cap, and printed forms, key-enter a counterclaim according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.9 Student-keyed counterclaim; rated acceptable according to criteria in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal guidelines.
3. Proofread documents and make any necessary corrections.
4. Review the importance of counterclaims for litigation cases.

DUTY AREA
9. PREPARING LITIGATION DOCUMENTS

COURSE
Secondary

TASK/COMPETENCY
9.10 Key-enter a deposition.

PERFORMANCE OBJECTIVE
P9.10 Given source material, legal cap, and printed forms, key-enter a deposition according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.10 Student-keyed deposition; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal guidelines.
3. Proofread documents and make any necessary corrections.
4. Review the importance of depositions for litigation cases.

DUTY AREA	**COURSE**
9. PREPARING LITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY
9.11 Key-enter pleadings and discovery.

PERFORMANCE OBJECTIVE
P9.11 Given source material, legal cap, and printed forms, key-enter pleadings and discovery according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.11 Key-entered pleadings and discovery; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal cap and printed forms according to instructor/legal standards.
3. Proofread documents and make any necessary corrections.
4. Review the importance of pleadings and discovery for litigation cases.

DUTY AREA	**COURSE**
9. PREPARING LITIGATION DOCUMENTS	Secondary

TASK/COMPETENCY
9.12 Key-enter papers for bankruptcy.

PERFORMANCE OBJECTIVE
P9.12 Given source material, legal cap, and printed forms, key-enter papers for bankruptcy according to instructor/legal guidelines.

PERFORMANCE MEASURE
M9.12 Student-keyed papers for bankruptcy; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare original and appropriate copies.
2. Key-enter documents in legal format on legal caps and printed forms according to instructor/legal guidelines.
3. Proofread documents and make any necessary corrections.
4. Review the importance of being able to file for bankruptcy.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 10. SEEKING EMPLOYMENT

10.1 List sources of information about employment opportunities.
10.2 Prepare for a job interview.
10.3 Prepare a resume.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	10.1, 10.2, 10.3
• Read with comprehension.	10.1, 10.2, 10.3
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	10.1, 10.2, 10.3
• Demonstrate critical thinking skills.	10.1, 10.2, 10.3
• Demonstrate a sense of responsibility for participating in discussion.	10.1, 10.2, 10.3
• Take notes from written, oral, and audiovisual material.	10.1, 10.2, 10.3
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	10.2, 10.3
• Interpret and verify numeric/data entries, including graphs and charts.	10.1, 10.2, 10.3
• Give clear oral and written directions.	
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	10.1, 10.2
• Follow multistep oral and written instructions.	10.1, 10.2, 10.3
• Communicate ideas, concepts, and opinions.	10.1, 10.2, 10.3
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	10.1, 10.2, 10.3
• Use general and technical references.	10.1, 10.2, 10.3
• Demonstrate appropriate emotional response.	10.1, 10.2, 10.3
• Access and interpret electronic communications.	10.1, 10.2, 10.3
• Read and interpret technical information.	10.1

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate operations involving integers and rationals.	
• Use calculators.	
• Use estimation.	

MATH COMPETENCY*

- Determine order of operations.
- Use algebraic concepts to solve problems.
- Relate fractions, decimals, and percents.
- Communicate mathematical information.
- Optimize scheduling.

*Based on locally derived occupational information

TECHNICAL COMPETENCY

DUTY AREA
10. SEEKING EMPLOYMENT

COURSE
Secondary

TASK/COMPETENCY
10.1 List sources of information about employment opportunities.

PERFORMANCE OBJECTIVE
P10.1 Given resource materials, list sources of information about employment opportunities. Resource list should be prepared in accordance with instructor guidelines to include include determining type of position desired and legal specialty involved.

PERFORMANCE MEASURE
M10.1 Student-produced resource list of employment opportunities; all items rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Determine type of position desired and legal specialty involved.
2. Research sources of information about desired position, including
   - Dictionary of Occupational Titles
   - Occupational Outlook Handbook
   - Employment Commission
   - guidance counselors
   - newspapers
   - computer software programs.
3. Prepare a list of appropriate sources of information for desired employment.
4. Identify sources of jobs, including friends, employment agencies, want ads, counselors, instructors, radio, telephone directory, and personal inquiries.
5. Identify information in ads, including abbreviations and job qualifications, duties, hours, and location. Have students bring in newspaper want ads.
6. Secure copies of pages related to legal office occupation from the Dictionary of Occupational Titles and the Occupational Outlook Handbook, and review the information with students.
7. Role play an interview on the telephone, in response to a want ad. Identify strengths and weaknesses of the perspective applicant.
8. Prepare a bulletin board containing information about job opportunities in the legal field. Include want ads, job bulletins, articles about jobs, skills required on the job, and other pertinent information.
9. Collect information, handouts, guides, etc. from speaker and/or representative from the Virginia Employment Commission who speaks with the class about using its services.

DUTY AREA
10. SEEKING EMPLOYMENT

COURSE
Secondary

TASK/COMPETENCY
10.2 Prepare for a job interview.

PERFORMANCE OBJECTIVE
P10.2 Given a simulated job lead, prepare for a job interview by becoming acquainted with the legal specialty, preparing information about job competencies, demonstrating appropriate appearance and personal conduct in accordance with instructor guidelines. Preparation should include a list of possible questions to be asked by interviewer and interviewee.

PERFORMANCE MEASURE
M10.2 Role-play activity; evaluated as acceptable on instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Investigate the legal specialty of prospective employer using media center resources, and report findings to the class.
2. Prepare information about competencies involved in prospective job, and suggest competencies that would be appropriate for a position in a legal office.
3. Compare personal qualifications to specific job competencies.
4. Research and prepare a list and/or bulletin board of "do's and don'ts" for personal conduct and appearance during an interview.
5. List possible questions to be asked by interviewer and interviewee.
6. Prepare a checklist that can be used to evaluate an interviewee's performance during an interview.
7. Organize into small groups and role play an interview situation, using a checklist to evaluate the interviewee's performance.
8. Conduct mock interviews with the students. Ask the interviewers to discuss with the students strengths and weaknesses displayed during the interviews.

DUTY AREA
10. SEEKING EMPLOYMENT

COURSE
Secondary

TASK/COMPETENCY
10.3 Prepare a resume.

PERFORMANCE OBJECTIVE
P10.3 Given instruction and materials, prepare a resume in accordance with instructor guidelines.

PERFORMANCE MEASURE
M10.3 Student-produced resume; all items rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the use and importance of a resume in seeking employment.
2. Design a poster or flyer that illustrates types of information included on a resume.
3. Use transparencies in following steps needed in key-entering a resume.
4. Take notes on the video "Does Your Resume Wear Blue Jeans?" and discuss.
5. List information and format to be included on a personal resume.
6. Compile information.
7. Key-enter resume, including
   - job or career objective
   - personal data (name, address, telephone number, social security number)
   - educational history (names and addresses of schools attended, degrees or certificates received, dates of attendance and graduation)
   - job experience (all jobs including summer employment, names and addresses of employers, dates of employment)
   - special interests (volunteer work in church or community, hobbies that relate to work, extracurricular activities)
   - references (names, addresses, and telephone numbers of at least three people who are not relatives and who have given permission to be listed as references).

RELATED ACADEMIC COMPETENCIES

DUTY AREA 11. USING COMPUTERS

11.1 Identify the physical components of a computer system.
11.2 Perform basic MS-DOS commands.
11.3 Manage files.
11.4 Identify computer software.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	11.1, 11.2, 11.3, 11.4
• Read with comprehension.	11.1, 11.2, 11.3, 11.4
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	11.4
• Demonstrate critical thinking skills.	11.1, 11.2, 11.3, 11.4
• Demonstrate a sense of responsibility for particpating in discussion.	
• Take notes from written, oral, and audiovisual material.	11.1, 11.2, 11.3, 11.4
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	
• Interpret and verify numeric/data entries, including graphs and charts.	
• Give clear oral and written directions.	11.1, 11.2, 11.3, 11.4
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	11.1, 11.2, 11.3, 11.4
• Follow multistep oral and written instructions.	11.1, 11.2, 11.3, 11.4
• Communicate ideas, concepts, and opinions.	
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	11.1, 11.2, 11.3, 11.4
• Use general and technical references.	11.1, 11.2, 11.3, 11.4
• Demonstrate appropriate emotional response.	
• Access and interpret electronic communications.	11.1, 11.2, 11.3, 11.4
• Read and interpret technical information.	11.1, 11.2, 11.3, 11.4

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate operations involving integers and rationals.	
• Use calculators.	
• Use estimation.	

MATH COMPETENCY*

- Determine order of operations.
- Use algebraic concepts to solve problems.
- Relate fractions, decimals, and percents.
- Communicate mathematical information.
- Optimize scheduling.

*Based on locally derived occupational information

TECHNICAL COMPETENCY

DUTY AREA
11. USING COMPUTERS

COURSE
Secondary

TASKS/COMPETENCY
11.1 Identify the physical components of a computer system.

PERFORMANCE OBJECTIVE
P11.1 Given necessary information, identify the physical components of a computer system in accordance with instructor checklist. Identification should include the five basic types of computer hardware.

PERFORMANCE MEASURE
M11.1 Written or oral identification; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify five basic types of hardware:
    - Input devices - keyboard, mouse, scanner, joystick
    - Output devices - video screen and printer
    - CPU - Central Processing Unit - arithmetic and logical circuitry
    - Internal Computer Memory - Rom and Ram.
    - External Storage Devices - diskettes and hard disk.
2. Describe how to take care of a computer.

DUTY AREA	**COURSE**
11. USING COMPUTERS	Secondary

TASK/COMPETENCY

11.2 Perform basic MS-DOS commands.

PERFORMANCE OBJECTIVE

P11.2 Given commands and demonstration of the use of the commands, perform basic MS-DOS commands according to instructor guidelines.

PERFORMANCE MEASURE

M11.2 Student demonstration; participation evaluated as acceptable based on instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain why computers need an operating system.
2. Define DOS.
3. Use the computer to enter the following DOS commands:

• cls	Clears screen
• dir	Display all files in current drive
• dir/w	Display a wide file listing of the current drive
• dir/p	Display file listing with pause of the current drive
• ver	Displays DOS version used to boot the computer
• format	Initializes diskette to accept files
• label	Change, delete, or enter disk volume labels
• time	Enter time
• date	Enter date.

4. Reboot the computer by pressing CTRL + ALT + DEL to restart the computer while it is already on.
5. Explain how to recognize valid file names and extensions.
6. Demonstrate how to change to root directory.
7. Demonstrate how to exit a program properly.
8. Identify the care and handling of a diskette.
   a. Insert a disk.
   b. Format a disk.
   c. Change the current or default drive.
   d. Write-protect a diskette.

DUTY AREA **COURSE**
11. USING COMPUTERS Secondary

TASKS/COMPETENCY
11.3 Manage files.

PERFORMANCE OBJECTIVE
P11.3 Given commands and demonstration, manage files by copying, renaming, and deleting a file according to instructor guidelines.

PERFORMANCE MEASURE
M11.3 Hands-on activity; participation evaluated as acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Copy a file from the source disk to the target disk.
2. Copy file to another directory.
3. Use the global command to copy all files from one disk to another.
4. Rename a file on a disk in the default or target drive.
5. Delete a file from a disk in the default or target drive.
6. Use the global copy command to copy all files from one disk to another.

DUTY AREA **COURSE**
11. USING COMPUTERS AND MS-DOS Secondary

TASKS/COMPETENCY
11.4 Identify computer software.

PERFORMANCE OBJECTIVE
P11.4 Given necessary information, identify computer software according to instructor guidelines.

PERFORMANCE MEASURE
M11.4 Small-group presentation; rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define software.
2. Describe ten categories of applications.
    - Word Processor
    - Spreadsheets
    - Database
    - Graphics
    - Desktop publishing
    - Communication
    - Integrated programs
    - Financial
    - Education
    - Games
3. Describe how to take care of software.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 12. PERFORMING SPECIAL OFFICE DUTIES

12.1 Maintain a daily log of employer/employee activities.
12.2 Type attorney's time sheet.
12.3 Maintain a personal calendar.
12.4 Purchase office supplies.
12.5 Make arrangements for employers' trips and establish an itinerary.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	12.1, 12.2, 12.3, 12.4, 12.5
• Read with comprehension.	12.1, 12.2, 12.3, 12.4, 12.5
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	12.1, 12.2, 12.3, 12.4, 12.5
• Demonstrate critical thinking skills.	12.1, 12.2, 12.3, 12.4, 12.5
• Demonstrate a sense of responsibility for particpating in discussion.	12.1, 12.2, 12.3, 12.4, 12.5
• Take notes from written, oral, and audiovisual material.	12.1, 12.2, 12.3, 12.4, 12.5
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	12.4, 12.5
• Interpret and verify numeric/data entries, including graphs and charts.	12.1, 12.2, 12.3, 12.4, 12.5
• Give clear oral and written directions.	12.1, 12.2, 12.3
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	12.3
• Follow multistep oral and written instructions.	12.1, 12.2, 12.3, 12.4, 12.5
• Communicate ideas, concepts, and opinions.	12.1, 12.2, 12.3, 12.4, 12.5
• Complete forms with accuracy.	12.1, 12.2, 12.3, 12.4, 12.5
• Ask questions necessary to gain assistance and information.	12.1, 12.2, 12.3, 12.5
• Use general and technical references.	12.1, 12.2, 12.3, 12.4, 12.5
• Demonstrate appropriate emotional response.	12.1, 12.2, 12.3, 12.4
• Access and interpret electronic communications.	12.1, 12.2, 12.3, 12.4, 12.5
• Read and interpret technical information.	

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	12.2, 12.4, 12.5
• Use measures of central tendencies.	
• Round numbers.	12.2, 12.4
• Use percent to solve problems.	12.4, 12.5
• Interpret/make graphs and charts.	12.1, 12.2, 12.5
• Sequence numbers.	
• Perform and convert measurements.	12.5
• Find ratio and proportion.	
• Use formulas.	12.2, 12.4
• Compute unit prices.	12.2, 12.4, 12.5
• Calculate operations involving integers and rationals.	
• Use calculators.	12.1, 12.2, 12.4, 12.5
• Use estimation.	12.2, 12.4, 12.5

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Determine order of operations.	
• Use algebraic concepts to solve problems.	12.4
• Relate fractions, decimals, and percents.	12.2, 12.4, 12.5
• Communicate mathematical information.	12.2, 12.4, 12.5
• Optimize scheduling.	12.1, 12.3, 12.4, 12.5

*Based on locally derived occupational information

DUTY AREA **COURSE**
12. PERFORMING SPECIAL OFFICE DUTIES Secondary

TASK COMPETENCY
12.1 Maintain a daily log of employer/employee activities.

PERFORMANCE OBJECTIVES
P12.1 Given a list of duty assignments, maintain a daily log of employer/employee activities in accordance with instructor guidelines.

PERFORMANCE MEASURE
M12.1 Student-produced log; all items rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Review activities and duty assignments that are to be recorded and maintained in a daily log.
2. Key-enter each activity for employer/employee from a list of assignments given by instructor.
3. Write a brief summary of why a daily log of employer/employee activities should be maintained in a law office.

DUTY AREA **COURSE**
12. PERFORMING SPECIAL OFFICE DUTIES Secondary

TASK/COMPETENCY
12.2 Type attorney's time sheet.

PERFORMANCE OBJECTIVE
P12.2 Given a list of time spent on various cases and with clients, calculate and type attorney's time sheet. Time sheet should be typed in accordance with instructor guidelines.

PERFORMANCE MEASURE
M12.2 Student-produced time sheet; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain how to calculate attorney's time by using a fee schedule sheet.
2. Calculate attorney's time spent on various cases and with clients from fee schedule sheet.
3. Role play, explaining to clients an attorney's fees for certain services rendered.

DUTY AREA
12. PERFORMING SPECIAL OFFICE DUTIES

COURSE
Secondary

TASK/COMPETENCY
12.3 Maintain a personal calendar.

PERFORMANCE OBJECTIVES

P12.3 Given a list of assignments, meeting dates, court dates, etc., maintain a personal calendar. Calendar should be kept in accordance with instructor guidelines.

PERFORMANCE MEASURE
M12.3 Student-produced calendar; all items rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Review activities and assignments that are to be recorded and maintained in a personal calendar.
2. Key-enter each activity and assignments in a personal calendar. List will be provided by instructor.
3. Identify the advantages and disadvantages of maintaining a personal calendar.

DUTY AREA
12. PERFORMING SPECIAL OFFICE DUTIES

COURSE
Secondary

TASK/COMPETENCY
12.4 Purchase office supplies.

PERFORMANCE OBJECTIVES
P12.4 Given an ongoing inventory list of supplies, purchase office supplies using purchase order and requisition forms. All purchases must be made according to instructor checklist.

PERFORMANCE MEASURE
M12.4 Student demonstration; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain inventory control and ordering of supplies.
2. Key-enter supplies needed for purchasing on requisitions or purchase order form(s). List to be supplied by instructor.
3. Key-enter a letter purchasing supplies from a supply order company.

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DUTY AREA
12. PERFORMING SPECIAL OFFICE DUTIES

COURSE
Secondary

TASK/COMPETENCY
12.5 Make arrangements for employer's trip and establish an itinerary.

PERFORMANCE OBJECTIVES
P12.5 Given a list of events and activities for travel, make arrangements for employer's trip and establish an itinerary in accordance with instructor guidelines. This should include identification of most economical and/or fastest method to travel, as well as a list of hotel, transportation, and food options.

PERFORMANCE MEASURE
M12.5 Student-completed trip arrangements and itinerary; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Outline steps in preparing for an employer's trips and travel plans.
2. Identify the most economical and/or fastest method for traveling according to employer specifications.
3. Make a list of hotel accommodations, mode of transportation, food establishments, and any other items of importance to employer for trip.
4. Key-enter an itinerary for trip. Have itinerary checked/reviewed by employer before finalizing itinerary.
5. Explain
    - why advance planning for travel is important
    - why it is important to know the various kinds of services available for travel and how to use travel agencies to the advantage of the law office
    - why it is important to establish an itinerary
    - how to handle clients while employer is away on a trip
    - what to do after the employer returns from a trip.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 13. PREPARING FOR ADVANCEMENT

13.1 List sources for information offering continuing education.
13.2 Compose a letter of resignation.
13.3 Compose a letter of promotion.

LANGUAGE ARTS COMPETENCY*	TECHNICAL COMPETENCY
• Develop listening comprehension skills.	13.1, 13.2, 13.3
• Read with comprehension.	13.1, 13.2, 13.3
• Demonstrate proficiency in both pre-planned and spontaneous speaking appropriate for the speaker's purpose and audience.	13.1, 13.2, 13.3
• Demonstrate critical thinking skills.	13.1, 13.2, 13.3
• Demonstrate a sense of responsibility for participating in discussion.	13.1, 13.2, 13.3
• Take notes from written, oral, and audiovisual material.	13.1, 13.2, 13.3
• Write, revise, edit, proofread, and document papers and forms appropriate for the writer's purpose and audience.	13.1, 13.2, 13.3
• Interpret and verify numeric/data entries, including graphs and charts.	13.1, 13.2, 13.3
• Give clear oral and written directions.	
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	13.1, 13.2, 13.3
• Follow multistep oral and written instructions.	13.1, 13.2, 13.3
• Communicate ideas, concepts, and opinions.	13.1, 13.2, 13.3
• Complete forms with accuracy.	13.1, 13.2, 13.3
• Ask questions necessary to gain assistance and information.	
• Use general and technical references.	13.1, 13.2, 13.3
• Demonstrate appropriate emotional response.	13.1, 13.2, 13.3
• Access and interpret electronic communications.	
• Read and interpret technical information.	13.1, 13.2, 13.3

MATH COMPETENCY*	TECHNICAL COMPETENCY
• Perform basic operations using whole numbers, fractions, and decimals.	
• Use measures of central tendencies.	
• Round numbers.	
• Use percent to solve problems.	
• Interpret/make graphs and charts.	
• Sequence numbers.	
• Perform and convert measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate operations involving integers and rationals.	
• Use calculators.	
• Use estimation.	

MATH COMPETENCY*

- Determine order of operations.
- Use algebraic concepts to solve problems.
- Relate fractions, decimals, and percents.
- Communicate mathematical information.
- Optimize scheduling.

*Based on locally derived occupational information

TECHNICAL COMPETENCY

DUTY AREA
13. PREPARING FOR ADVANCEMENT

COURSE
Secondary

TASK/COMPETENCY
13.1 List sources for information offering continuing education.

PERFORMANCE OBJECTIVE
P13.1 Given resources, list sources for information offering continuing education. List should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M13.1 Student-produced resource list; all items rated acceptable in accordance with instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify type of continuing education desired and legal specialty involved.
2. Research sources of information for continuing education:
    - colleges and universities
    - community colleges
    - personnel department of law firm/organization
    - newspapers
    - computerized programs (Internet).
3. Make a list of various sources of information offering continuing education.
4. Describe sources of information and the variation in what they offer.
5. Bring in catalogs, booklets, leaflets, etc., listing course offerings.
6. Prepare a bulletin board on continuing education.
7. Collect information, handouts, guides, etc., from speakers and/or representatives from the above sources who speak to classes, and discuss educational opportunities beyond high school.

DUTY AREA
13. PREPARING FOR ADVANCEMENT

COURSE
Secondary

TASK/COMPETENCY
13.2 Compose a letter of resignation.

PERFORMANCE OBJECTIVE
P13.2 Given a simulated situation, compose a letter of resignation in accordance with instructor guidelines.

PERFORMANCE MEASURE
M13.2 Student-produced letter of resignation; rated acceptable according to criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe various situations and steps to be taken when a letter of resignation is needed.
2. Select one situation in which a letter of resignation would be needed, and compose a letter.
3. Exchange, read, edit, discuss, and evaluate each other's letters of resignation.

DUTY AREA **COURSE**

13. PREPARING FOR ADVANCEMENT Secondary

TASK/COMPETENCY

13.3 Compose a letter for promotion.

PERFORMANCE OBJECTIVE

P13.3 Given a simulated situation, compose a letter for promotion according to instructor guidelines.

PERFORMANCE MEASURE

M13.3 Student-produced letter for promotion; rated acceptable according to criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe various situations and steps to be taken when a letter of promotion is needed.
2. Select one situation in which a letter of promotion would be needed, and compose a letter.
3. Exchange, read, edit, discuss, and evaluate each other's letters of promotion.

DUTY AREA

14. PREPARING DOCUMENTS FOR THE TRIAL – CIVIL CASES
Essential Postsecondary Tasks

TASKS/COMPETENCIES

14.1 Complete the initial paperwork needed to process a complaint or an answer.
14.2 Identify the various methods to avoid a lawsuit.
14.3 Process a plaintiff's complaint and summons.
14.4 File a defendant's answer.

DUTY AREA
14. PREPARING DOCUMENTS FOR THE TRIAL – CIVIL CASES

COURSE
Postsecondary

TASK/COMPETENCY
14.1 Complete the initial paperwork needed to process a complaint or an answer.

PERFORMANCE OBJECTIVE
P14.1 Given fictitious legal cases, both criminal and civil, complete the initial paperwork needed to process a complaint or an answer in accordance with instructor guidelines. Include an interview sheet, fee arrangements, and securement of client records.

PERFORMANCE MEASURE
M14.1 Student-completed paperwork; evaluated as acceptable according to instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe preparation to be made for both criminal and civil cases.
2. Describe the initial client interview sheet.
3. Role-play by interviewing each other about a fictitious legal case and complete the initial client interview sheet.
4. Describe and list the various fee arrangements available in a legal office.
5. Key-enter a retainer agreement.
6. Identify the various authorization needed to secure records from clients.
7. Key-enter a request for medical records.

DUTY AREA
14. PREPARING DOCUMENTS FOR THE TRIAL – CIVIL CASES

COURSE
Postsecondary

TASK/COMPETENCY
14.2 Identify the various methods to avoid a lawsuit.

PERFORMANCE OBJECTIVE
P14.2 Given a variety of cases for an attorney to resolve, identify the various methods to avoid a lawsuit. Identification should be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M14.2 Small group presentation; rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVE/LEARNING ACTIVITIES
1. Explain the purpose of demand letters.
2. Compose and key-enter a simple demand letter, using a fictitious case.
3. Explain the purpose of a conference.
4. Role play fictitious legal cases wherein conferences are necessary.
5. Explain arbitration.
6. Set up a case for arbitration.
7. Divide into small groups and present a list of alternatives available to avoid a lawsuit using fictitious legal cases.

DUTY AREA **COURSE**

14. PREPARING DOCUMENTS FOR THE TRIAL – CIVIL CASES Postsecondary

TASK/COMPETENCY

14.3 Process a plaintiff's complaint and summons.

PERFORMANCE OBJECTIVE

P14.3 Given instructions by an instructor/attorney, process a plaintiff's complaint and summons in accordance with the guidelines stated by instructor/attorney.

PERFORMANCE MEASURE

M14.3 Student-processed complaint and summons; all items rated acceptable according to instructor/attorney guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define and explalin complaints and summons.
2. Define the following legal terms: *allegations, causes of action,* and *damages.*
3. Outline format of a complaint.
4. Define the following legal terms: *venue, jurisdiction, parties, prayer, signature, verification, true copy, identification of law office, exhibits,* and *conforming.*
5. Key-enter a simple complaint.
6. Define and discuss summons and related materials.
7. Key-enter a summons.

DUTY AREA **COURSE**

14. PREPARING DOCUMENTS FOR THE TRIAL – CIVIL CASES Postsecondary

TASK/COMPETENCY

14.4 File a defendant's answer.

PERFORMANCE OBJECTIVE

14.4 Given a complaint, file a defendant's answer in accordance with instructor/attorney guidelines.

PERFORMANCE MEASURE

M14.4 Student-produced written answer to a complaint; rated acceptable based on criteria specified in instructor/attorney guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the following legal terms: *answer, counterclaim, affirmative defense, cross-claim, verification, true copy, mailing affidavit, reply,* and *issues are joined.*
2. Outline format of an answer
3. Key-enter an answer.

DUTY AREA

15. PERFORMING DISCOVERY AND PRETRIAL ACTIVITIES
Essential Postsecondary Tasks

TASKS/COMPETENCIES

15.1 Prepare various legal documents for discovery.
15.2 Prepare pretrial information.

DUTY AREA	**COURSE**
15. PERFORMING DISCOVERY AND PRETRIAL ACTIVITIES	Postsecondary

TASK/COMPETENCY

15.1 Prepare various legal documents for discovery.

PERFORMANCE OBJECTIVE

P15.1 Given documents such as depositions, interrogatories, demand to produce, motions, affidavits, orders, stipulation, and subpoenas, prepare various legal documents for discovery according to instructor/attorney guidelines.

PERFORMANCE MEASURE

M15.1 Student-produced legal documents; all documents rated acceptable according to instructor/attorney checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Outline the Federal Rules of Civil Procedures governing the way discovery can be conducted in federal courts.
2. Define and explain the following legal terms: *depositions, interrogatories, demand to produce, motions, affidavits, orders, stipulation,* and *subpoenas.*
3. Outline formats for each document named above.
4. Key-enter answers to interrogatories.
5. Key-enter a motion, an affidavit, and an order.
6. Key-enter a stipulation.
7. Key-enter a subpoena.

DUTY AREA	**COURSE**
15. PERFORMING DISCOVERY AND PRETRIAL ACTIVITIES	Postsecondary

TASK/COMPETENCY

15.2 Prepare pretrial information.

PERFORMANCE OBJECTIVE

P15.2 Given a variety of papers related to a legal case, prepare pretrial information in accordance with instructor/attorney guidelines. Preparation should include use of computer, file boxes, notebooks, audiovisual displays, and visual displays.

PERFORMANCE MEASURE

M15.2 Student-prepared pretrial information; rated acceptable based on criteria specified in instructor/attorney guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of the collection of all pretrial related information for a case.
2. List the sources of information including computer, file boxes, notebooks, audiovisual displays, and visual displays.
3. Prepare pretrial information.
4. Prepare short presentations explaining the advantages and disadvantages of thoroughness in collecting and preparing information for pretrial.

DUTY AREA

16. PREPARING CIVIL CASE DOCUMENTS – DURING AND AFTER THE TRIAL

Essential Postsecondary Tasks

TASK/COMPETENCIES

16.1 Describe the procedures involved in a civil trial.
16.2 Prepare additional paperwork after trial commences.
16.3 Prepare forms needed by the attorney before going to trial.
16.4 Prepare the paperwork for a case that may be settled after going to trial and before final judgment.
16.5 Prepare a brief and other paperwork involved in an appeal.
16.6 Perform daily office routine assignments when the attorney is out.

DUTY AREA
16. PREPARING CIVIL CASE DOCUMENTS – DURING AND AFTER THE TRIAL

COURSE
Postsecondary

TASK/COMPETENCY
16.1 Describe the procedures involved in a civil trial.

PERFORMANCE OBJECTIVE
P16.1 Given a fictitious case, describe the procedures involved in a civil trial according to instructor/attorney guidelines. This should include jury selection, opening statement, witnesses, testimony, closing arguments, and final procedures.

PERFORMANCE MEASURE
M16.1 Oral presentation; evaluated as acceptable according to instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe how to select a jury, using a fictitious case.
2. Write and deliver an oral opening statement.
3. Role play as witnesses and give testimony.
4. Present closing arguments.
5. Role play and present jury instructions, deliberations, the verdict, judgment, and post-trial motions.

DUTY AREA
16. PREPARING CIVIL CASE DOCUMENTS – DURING AND AFTER THE TRIAL

COURSE
Postsecondary

TASK/COMPETENCY
16.2 Prepare additional paperwork after trial commences.

PERFORMANCE OBJECTIVE
P16.2 Given instructions by the instructor/attorney, prepare additional paperwork after trial commences in accordance with guidelines stated by instructor.

PERFORMANCE MEASURE
M16.2 Instructor/attorney-prepared checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Key-enter fictitious jury instructions.
2. Key-enter fictitious written motions, such as
    - motion for nonsuit
    - motion for limine
    - motion for directed verdict
    - motion for mistrial.
    - motion for a new trial.

DUTY AREA **COURSE**

16. PREPARING CIVIL DOCUMENTS – DURING AND AFTER THE TRIAL

Postsecondary

TASK/COMPETENCY

16.3 Prepare forms needed by the attorney before going to trial.

PERFORMANCE OBJECTIVE

P16.3 Given sample forms and requirements, prepare forms needed by the attorney before going to trial according to instructor checklist.

PERFORMANCE MEASURE

M16.3 Student-prepared forms; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Key-enter an entry of default.
2. Key-enter a judgment on default.
3. Key-enter a stipulation of discontinuance.
4. Key-enter a release of all claims.

DUTY AREA **COURSE**

16. PREPARING CIVIL CASE DOCUMENTS – DURING AND AFTER THE TRIAL

Postsecondary

TASK/COMPETENCY

16.4 Prepare the paperwork for a case that may be settled after going to trial and before final judgment.

PERFORMANCE OBJECTIVE

P16.4 Given the required paperwork, prepare the paperwork for a case that may be settled after going to trial and before final judgment. Paperwork should include a dismissal stipulation signed by attorney, checks for plaintiff's attorney, and recording of all plaintiff's social security numbers.

PERFORMANCE MEASURE

M16.4 Student-produced paperwork; rated acceptable according to instructor/attorney-specified criteria

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Complete a dismissal stipulation to be signed by the attorney.
2. Prepare checks for the plaintiff's attorney.
3. Record social security numbers of all the plaintiffs.

DUTY AREA
16. PREPARING CIVIL CASE DOCUMENTS – DURING AND AFTER THE TRIAL

COURSE
Postsecondary

TASK/COMPETENCY
16.5 Prepare a brief and other paperwork involved in an appeal.

PERFORMANCE OBJECTIVE
P16.5 Given documents, prepare a brief and other paperwork involved in an appeal in accordance with instructor/attorney guidelines.

PERFORMANCE MEASURE
M16.5 Student-produced documents; rated acceptable according to instructor/attorney guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Key-enter the title page of appellant's brief in support of appeal.
2. Key-enter a table of contents of plaintiff's/appellant's brief.
3. Key-enter a table of authorities of plaintiff's/appellant's brief.
4. Key-enter the brief.

DUTY AREA
16. PREPARING CIVIL CASE DOCUMENTS – DURING AND AFTER THE TRIAL

COURSE
Postsecondary

TASK/COMPETENCY
16.6 Perform daily office routine assignments when the attorney is out.

PERFORMANCE OBJECTIVE
P16.6 Given tasks, perform daily office routine assignments when the attorney is out. Assignments should be computed in accordance with instructor guidelines.

PERFORMANCE MEASURE
M16.6 Instructor-prepared checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Reschedule client appointments.
2. Process incoming work.
3. Make new folders to supplement those that are too full.
4. Close files that are no longer needed.
5. Post time-slips or other financial records.

DUTY AREA

17. PERFORMING FAMILY LAW ACTIVITIES
Essential Postsecondary Tasks

TASKS/COMPETENCIES

17.1 Prepare a prenuptial agreement.
17.2 Identify the differences between annulment, separation, and dissolution.
17.3 Process a dissolution of marriage.
17.4 Process adoption documents for various types of adoptions.
17.5 Prepare documents for guardianships and conservatorship.

DUTY AREA **COURSE**
17. PERFORMING FAMILY LAW ACTIVITIES Postsecondary

TASK/COMPETENCY
17.1 Prepare a prenuptial agreement.

PERFORMANCE OBJECTIVE
P17.1 Given source materials, legal cap, and printed forms, prepare a prenuptial agreement according to instructor/attorney checklist.

PERFORMANCE MEASURE
M17.1 Prenuptial agreement ; all items rated acceptable according to instructor/attorney checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare an original, one copy for each client, and one copy for office files.
2. Key-enter a prenuptial agreement in specified format.
3. Use appropriate legal caps and follow all rules for key-entering each part.

DUTY AREA **COURSE**
17. PERFORMING FAMILY LAW ACTIVITIES Postsecondary

TASK/COMPETENCY
17.2 Identify the differences between an annulment, separation, and dissolution.

PERFORMANCE OBJECTIVE
P17.2 Given necessary information, identify the differences between an annulment, separation, and dissolution. Identification should be made in accordance with instructor/legal checklist.

PERFORMANCE MEASURE
M17.2 Written or oral identification; rated acceptable according to instructor/legal checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Write the definition of an *annulment, separation,* and *dissolution.*
2. Process documents using the terms *annulment, separation,* and *dissolution.*

DUTY AREA	**COURSE**
17. PERFORMING FAMILY LAW ACTIVITIES	Postsecondary

TASK/COMPETENCY
17.3 Process a dissolution of marriage.

PERFORMANCE OBJECTIVE
P17.3 Given necessary materials, process a dissolution of marriage document according to instructor/legal checklist. Process should include use of appropriate copies, client information, petition, response, decree, and captions for contempt proceeding.

PERFORMANCE MEASURE
M17.3 Student-processed document; rated acceptable according to instructor/legal checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare originals and client's copy; make a copy for the office files.
2. Key-enter client's information on appropriate forms.
3. Key-enter petition for dissolution on legal cap.
4. Key-enter response to a petition on legal cap.
5. Key-enter a decree of dissolution of marriage.
6. Key-enter captions for contempt proceeding.

DUTY AREA	**COURSE**
17. PERFORMING FAMILY LAW ACTIVITIES	Postsecondary

TASK/COMPETENCY
17.4 Process adoption documents for various types of adoptions.

PERFORMANCE OBJECTIVE
P17.4 Given necessary materials, process adoption documents for various types of adoptions. Processing should be made in accordance with instructor/legal guidelines to include consent to, petition for, and decree of adoption.

PERFORMANCE MEASURE
M17.4 Student-processed adoption documents; all items rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify types of adoptions for processing adoption documents.
2. Key-enter a consent to adopt on appropriate legal cap.
3. Prepare a petition for adoption on the appropriate form.
4. Prepare a decree of adoption on the appropriate form.

DUTY AREA
17. PERFORMING FAMILY LAW ACTIVITIES

COURSE
Postsecondary

TASK/COMPETENCY
17.5 Prepare documents for guardianships and conservatorship.

PERFORMANCE OBJECTIVE
P17.5 Given necessary materials, prepare documents for guardianships and conservatorship according to instructor/legal guidelines.

PERFORMANCE MEASURE
M17.5 Student-prepared documents; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Prepare a caption for a lawsuit involving a minor.
2. Prepare a petition for appointment of a guardian.
3. Prepare letters of guardianship and conservatorship.

DUTY AREA

18. PREPARING LAW AND CRIMINAL CASES
Essential Postsecondary Tasks

TASKS/COMPETENCIES

18.1 Explain the basic difference between civil and criminal law.
18.2 Describe the major types of crimes: treason, felonies, misdemeanors, and violations.
18.3 Explain the different classifications of crimes and the types of crimes under each classification.
18.4 Locate information concerning different types of crimes in the State Statutes for the state of Virginia.

DUTY AREA
18. PREPARING LAW AND CRIMINAL CASES

COURSE
Postsecondary

TASK/COMPETENCY
18.1 Explain the basic difference between civil and criminal law.

PERFORMANCE OBJECTIVE
P18.1 Given instructions and resources, explain the basic difference between civil and criminal law. Explanation should be based on criteria specified by instructor.

PERFORMANCE MEASURE
M18.1 Written explanation; rated acceptable based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain civil and criminal law cases.
2. Illustrate correct formats to be used.
3. Illustrate correct legal caps and forms to be used.
4. Key-enter a contract to include
   - competent parties
   - legality of subject matter
   - consideration.

DUTY AREA
18. PREPARING LAW AND CRIMINAL CASES

COURSE
Postsecondary

TASK/COMPETENCY
18.2 Describe the major types of crimes: treason, felonies, misdemeanors, and violations.

PERFORMANCE OBJECTIVE
P18.2 Given various cases, identify and describe the major types of crimes: treason, felonies, misdemeanors, and violations. Description should be made in accordance with instructor/legal guidelines.

PERFORMANCE MEASURE
M18.2 Description in chart form; rated acceptable according to instructor/legal guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe the major types of crimes: treason, felonies, misdemeanors, and violations.
2. Identify formats used in processing forms.
3. Identify forms used in document preparation.

4. Key-enter a report on bail procedures.

DUTY AREA	**COURSE**
18. PREPARING LAW AND CRIMINAL CASES	Postsecondary

TASK/COMPETENCY

18.3 Explain the different classifications of crimes and the types of crimes under each classification.

PERFORMANCE OBJECTIVE

P18.3 Given a list of crimes, explain the different classifications of crimes and the types of crimes under each classification according to instructor/legal guidelines. Classifications should include offenses against state and public justice, persons, property, fraud and deception, public order, public health, decency, and animals.

PERFORMANCE MEASURE

M18.3 Outline; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the classification of crimes.
2. Classify crimes in various categories listed below using information from the State Statues about crimes.
    a. Offenses against the state and public justice
        - bribery
        - perjury
        - resisting arrest
    b. Offenses against persons
        - homicide
        - mayhem
        - assault
        - kidnapping
        - rape
    c. Offenses against property
        - theft
        - burglary
        - robbery
        - arson
    d. Offenses involving fraud or deception
        - forgery
        - illegal use of pen registers, and trap and trace devices
    e. Offenses against public order
        - riot
        - disorderly conduct
        - harassment.
    f. Offenses against public health, decency, and animals:
        - prostitution

DUTY AREA
18. PREPARING LAW AND CRIMINAL CASES

COURSE
Postsecondary

TASK/COMPETENCY
18.4 Locate information concerning different types of crimes in the Statutes for the state of Virginia.

PERFORMANCE OBJECTIVE
P18.4 Given a list of fictitious crimes committed in the state of Virginia, locate information concerning different types of crimes in the Statutes for the State of Virginia according to instructor specifications.

PERFORMANCE MEASURE
M18.4 Written or oral report; information rated acceptable according to instructor specifications

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Compile information concerning ten different types of crimes in the state of Virginia State Statutes.
    - List the name of each crime.
    - Define the crime.
    - Determine if it is a misdemeanor or felony.
    - Determine if it is Class A, B, or C.
    - Determine the amount of fine that can be assessed according to the penalty chart.
    - Use the penalty chart to determine how long the person can be put in jail.
2. Key-enter a report on the Grand Jury, including the following:
    - how many people serve on a grand jury
    - how they are selected
    - how long they serve
    - what process is involved.

PROGRAM DESIGN

Secondary Course Offerings

Postsecondary Course Requirements

COURSE OFFERINGS
Legal Systems Administration
(Secondary Level)

It is recommended that all students take one semester each of Keyboarding Applications and Introduction to Computer Applications.

Principles of Business and Marketing (6115)
Keyboarding Applications (6152)
Office Administration I and II (6621)
Word Processing (6625)

******

OR

Principles of Business and Marketing (6115)
Keyboarding Applications (6152)
Medical Systems Administration (6730)

******

OR

Principles of Business and Marketing (6115)
Keyboarding Applications (6152)
Legal Systems Administration (6735)

*A foreign language may be required for enrollment in some college programs.

POSTSECONDARY CURRICULUM OPTIONS

Associate in Applied Science Degree in Legal Office Specialist

The Associate in Applied Science Degree in Legal Office Specialist is designed for students who intend to seek employment in the legal office specialist field upon completion of the curriculum.

Grade 13
FIRST SEMESTER

Course #	Title
BUS 100	Principles of Business and Marketing
ENG 111	College Composition I
MTH 121	Fundamentals of Mathematics I
OFT 112	Keyboarding/Typewriting II
CIS 150	Introduction to Microcomputer Software
STD 100	Orientation

SECOND SEMESTER

Course #	Title
OFT 141	Word Processing I
OFT 205	Business Communications
OFT 137	Filing and Records Management
BUS 125	Applied Business Mathematics
ECO 120	Survey of Economics
________	Health, Physical Education, or Recreation

Grade 14
FIRST SEMESTER

Course #	Title
OFT 215	Executive Keyboarding/ Typewriting
OFT 142	Word Processing II
LGL 110	Introduction to Law and the Legal Assistant
OFT 241	Machine Transcription I
OFT 261	Legal Systems Administration
________	Health, Physical Education, or Recreation

SECOND SEMESTER

Course #	Title
PSY 201	Introduction to Psychology I
OFT 297	Cooperative Education in Office Systems Technology (or Business Elective)
OFT 235	Specialized Software Applications
________	Humanities/Fine Arts

POSTSECONDARY CURRICULUM OPTIONS

Office Systems Technology
Office Services Specialist Certificate
Specialization: Legal Office

The Office Services Specialist Certificate with specialization in Legal Office is designed for students who intend to seek employment in the legal office specialist field upon completion of the curriculum.

Grade 13
FIRST SEMESTER

Course #	Title
ENG 111	College Composition I
MTH 121	Fundamentals of Mathematics I
OFT 112	Keyboarding/Typewriting II
CIS 150	Introduction to Microcomputer Software
STD 100	Orientation
OFT 241	Machine Transcription

Grade 13
FIRST SEMESTER

Course #	Title
OFT 137	Filing and Records Management
OFT 141	Word Processing I
LGL 110	Introduction to Law and the Legal Assistant
OFT 205	Business Communications
OFT 261	Legal Systems Administration I

SUMMER SEMESTER

BUS 100	Introduction to Business
ECO 120	Survey of Economics

RESOURCES

Secondary

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401 Great Letters for Windows. 115 Business Letters, 115 Customer Letters, 115 Office Letters, 56 Personal Letters.

Gifis, Steven H. *Law Dictionary.* 3rd ed. (over 300 legal terms).

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Text - Workbook 0-538-63489-8/LF02AB

Kushner, John A. *How to Find and Apply for a Job.* South-Western Publishing Company.

Legal Ease for Windows. (over 40 customs legal documents).

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Legal Studies To Wit: Basic Legal Terminology. ISBN# 0538-701-048.

Legal Systems Administration: A Simulation. ISBN# 0538-700-521.

McCabe and McCabe. *Writing Effective Resumes: A Complete Guide.* South-Western Publishing Company.

Office Job Envelope Simulation. 0-538-60950-8/KY08CC.

Personal Law Firm. Version 2. 31 Documents and Worksheets. Personal Documents, Business Documents, Letters, Worksheets.

Swanson, Ross and Hanson. *Century 21 Accounting. First Year Course.* South-Western Publishing Company.

Swift Platinum. *PC Law Library.* (create 200 legally binding documents).

Understanding Taxes Internal Revenue Service

Virginia FBLA Adviser's Manual

Zedlitz, Robert. *Getting a Job Process Kit.* South-Western Publishing Company.

BEST COPY AVAILABLE

AUDIOVISUAL MATERIALS

Accounting: The One Degree with 360 of Possibilities (Video). American Institute of Certified Public Accountants

The FBLA Competitive Edge (Video).

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OFFICE SYSTEMS TECHNOLOGY

Developed by Central Virginia Community College

Amherst County Schools
Appomattox County Schools
Bedford County Schools
Campbell County Schools
Lynchburg City Schools

William M. Sandidge, Project Director

Edited and produced by
Virginia Vocational Curriculum and Resource Center
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OCCUPATIONAL ANALYSIS

Occupational Task List, Office Systems Technology

I. FUNDAMENTAL OFFICE OPERATIONS

1.1 Process incoming mail.
1.2 Process outgoing mail.
1.3 Identify types of filing supplies and equipment.
1.4 Retrieve materials or information from files.
1.5 File documents in nonelectric alphabetic, geographic, subject, or numeric filing systems.
1.6 Maintain employer's appointment calendar.
1.7 Maintain telephone logs.
1.8 Fax information.
1.9 Duplicate materials on copying machine.
1.10 Maintain bulletin board.
1.11 Key/type alphanumeric information.
1.12 Maintain office inventories.
1.13 Update professional manuals.
1.14 Destroy documents using a shredder.

II. FINANCIAL ACTIVITIES

2.1 Prepare and maintain checkbook balance.
2.2 Reconcile cash count and receipts.
2.3 Prepare bank deposits.
2.4 Reconcile bank statements.
2.5 Prepare and issue receipts.
2.6 Record general journal entries.
2.7 Post general journal entries to general ledger.
2.8 Prepare trial balance.
2.9 Prepare income and expense statements.
2.10 Prepare employee payroll records and paychecks.
2.11 Prepare employer payroll tax records.
2.12 Prepare and process purchase orders.
2.13 Establish, maintain, and replenish petty cash fund.

III. SUPERVISION OF OFFICE ACTIVITIES

3.1 Arrange for hardware repairs and maintenance.
3.2 Maintain software.
3.3 Establish work priorities.
3.4 Log work in and out.
3.5 Maintain production records.
3.6 Develop filing system for processed documents.

IV. SUPERVISION OF OFFICE PERSONNEL

No secondary tasks in this duty area.

V. PREPARATION AND DISTRIBUTION OF DOCUMENTS/INFORMATION

5.1 Prepare a spreadsheet document.
5.2 Prepare a word processing document.
5.3 Prepare a database document.
5.4 Prepare a graph.
5.5 Prepare a desktop publishing document.
5.6 Communicate using electronic mail.
5.7 Prepare a merge document.
5.8 Prepare a standardized document.
5.9 Distribute prepared documents.

VI. COMPUTER FILE MAINTENANCE

6.1 Format diskette.
6.2 Rename file.
6.3 Maintain backup file.
6.4 Delete unneeded file from storage.
6.5 Create user sub-directory.
6.6 Maintain user directory.
6.7 Update spelling dictionary.

VII. ADMINISTRATIVE SUPPORT OPERATIONS

7.1 Prepare camera-ready copy for duplication.
7.2 Coordinate schedule for courier service.
7.3 Make travel arrangements and reservations.

VIII. OFFICE COMMUNICATIONS

8.1 Compose routine correspondence at the computer.
8.2 Locate and verify information.
8.3 Interpret data on charts, graphs, illustrations, tables, and other visual aids.
8.4 Compose abstracts of articles and/or reports.
8.5 Prepare and distribute specialized documents.
8.6 Handle an outgoing telephone call.
8.7 Handle an incoming telephone call.
8.8 Send and receive message using voice mail.
8.9 Take accurate notes.
8.10 Coordinate/participate in teleconference.
8.11 Prepare and deliver an oral presentation.
8.12 Participate in the exchange of ideas within small and large groups.
8.13 Apply decision-making techniques to solve problems.
8.14 Handle customer relations.
8.15 Transcribe from recorded media.
8.16 Conduct tour of information processing operations.

POSTSECONDARY

I. FUNDAMENTAL OFFICE OPERATIONS

No postsecondary tasks in this duty area

II. FINANCIAL ACTIVITIES

- 2.14 Summarize charges for biling.
- 2.15 Prepare vouchers for payments due.
- 2.16 Prepare/monitor budget.
- 2.17 Report chargeback costs.

III. SUPERVISION OF OFFICE ACTIVITIES

- 3.7 Maintain hardware and software inventory records.
- 3.8 Establish information/word processing production standards.
- 3.9 Develop information needs required by programmers.
- 3.10 Resolve user problems.

IV. SUPERVISION OF OFFICE PERSONNEL

- 4.1 Prepare job description.
- 4.2 Maintain file of job openings.
- 4.3 Recruit and hire employees.
- 4.4 Conduct employee training.
- 4.5 Monitor employee performance.
- 4.6 Evaluate employee performance.
- 4.7 Coordinate work schedules.
- 4.8 Coordinate vacation schedules.
- 4.9 Assign work to employee.
- 4.10 Conduct staff meetings.
- 4.11 Maintain personnel records.
- 4.12 Promote employees.
- 4.13 Dismiss employee.

V. PREPARATION AND DISTRIBUTION OF DOCUMENTS/INFORMATION

- 5.10 Prepare microfilm/microfiche.
- 5.11 Convert document from one software program to another.

VI. COMPUTER FILE MAINTENANCE

No postsecondary tasks in this duty area

VII. ADMINISTRATIVE SUPPORT OPERATIONS

- 7.4 Participate in business and/or social functions.
- 7.5 Coordinate business and/or social functions.
- 7.6 Provide backup coverage for absent coworkers.
- 7.7 Obtain passport.
- 7.8 Plan a physical layout of the office.
- 7.9 Coordinate civic activities.

VIII. OFFICE COMMUNICATIONS

- 8.17 Develop a report.
- 8.18 Develop/conduct surveys.
- 8.19 Interpret software documentation.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS
(Essential Secondary Tasks)

TASKS/COMPETENCIES

1.1 Process incoming mail.
1.2 Process outgoing mail.
1.3 Identify types of filing supplies and equipment.
1.4 Retrieve materials or information from files.
1.5 File documents in nonelectric alphabetic, geographic, subject, or numeric filing systems.
1.6 Maintain employer's appointment calendar.
1.7 Maintain telephone logs.
1.8 Fax information.
1.9 Duplicate materials on copying machine.
1.10 Maintain a bulletin board.
1.11 Key/type alphanumeric information.
1.12 Maintain office inventories.
1.13 Update professional manuals.
1.14 Destroy documents using a shredder.

DUTY AREA
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
1.1 Process incoming mail.

PERFORMANCE OBJECTIVE
P1.1 Given 10 pieces of incoming mail, including "confidential or personal," process incoming mail. Mail should be placed in priority order, selected correspondence annotated, enclosures verified, and information recorded into register. Processing should be done according to system standard.

PERFORMANCE MEASURE
M1.1 Ten pieces of incoming mail; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define selected terms about processing incoming mail: *annotate, document* (verb), *inquiries, mailroom, personal/confidential mail, precedence, prioritizing mail, referral slip, routing slip,* and *separate cover.*
2. Outline the steps involved in processing incoming mail and the various methods employed by companies to sort and distribute mail.
3. Use office supply catalogs to find the types of equipment used in processing mail.
4. Explain the importance of handling personal/confidential mail properly and demonstrate the procedure to follow if confidential mail is opened by mistake.
5. Demonstrate how to verify enclosures; check for signatures and addresses; date and time-stamp mail using pen, rubber stamp, or time-stamp machine; and place in priority order for handling.
6. Annotate letters.
7. Prepare incoming mail register, mail items, and record necessary information into register.
8. Identify types of referral routing slips, and fill them out for a variety of situations.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.2. Process outgoing mail.

PERFORMANCE OBJECTIVE

P1.2 Given mailing instructions, 10 pieces of mail, and postage scale, process outgoing mail by verifying addresses, checking for enclosures, folding and inserting correspondence into envelopes, sealing, and determining postage according to system standard.

PERFORMANCE MEASURE

M1.2 Ten pieces of outgoing mail; eight of ten items rated acceptable according to system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define selected terms about processing outgoing mail: *courier/delivery service, computer-generated mailing list, drop box, forwarding mail, optical character recognition, postage meter, standard envelopes, volume mailings, window envelopes,* and *ZIP + 4.*
2. Fold correspondence into standard and window envelopes, sealing, and weighing mail.
3. Explain concepts of processing outgoing mail:
    - Identify methods used to purchase postage through stamps, stamped envelopes/cards, and postage meter.
    - Outline elements of volume mailing and the methods of keeping current mailing lists.
    - Describe the use of optical character readers to automate mail handling.
    - List addressing requirements that must be followed to assure accurate reading of outgoing mail by automated mail handling methods.
    - Explain the importance of using the ZIP + 4 system recommended by the USPS and what each group of numbers signifies.
    - Outline procedures for handling international mail.
    - Describe methods used for processing interoffice mail in small and large companies.
4. Go on a field trip to the local post office to observe how different classes of mail are processed.
5. Look up assigned series of addresses in a ZIP Code Directory.
6. List the various classes of mail and specialized mail services.
7. Determine the class and additional services required for listed items.
8. Complete forms for certified, registered, and express mail.
9. Demonstrate correct procedures for preparing packages for mailing.
10. Weigh and calculate postage for a variety of items using selected classes of mail.
11. Have a courier service representative speak to the class about their services, scheduling, and regulations.

DUTY AREA
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES
Legal Systems Administration (6735),
Medical Systems Administration (6730),
and Office Administration (6621)

TASK/COMPETENCY
1.3 Identify types of filing supplies and equipment.

PERFORMANCE OBJECTIVE
P1.3 Given a list of terms and definitions, identify types of filing supplies and filing equipment according to system standard.

PERFORMANCE MEASURE
M1.3 Matching test; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms about types of filing supplies and equipment: *accession book, aperture cards, card files, file folders, file sorters, guides (primary and secondary), hanging (suspended) folders, horizontal (flat) files, index card control file, labels (folder and drawer), lateral file cabinets, microfiche, microfilm jackets, microforms, microimaging systems, mobile files, open-shelf files, out guides/folders, substitution cards, requisition forms and cards, rotary units, tab, tickler file,* and *vertical file cabinets.*
2. Explain topics relating to filing supplies and equipment:
   - advantages and disadvantages of using specific supplies and equipment
   - advantages and disadvantages of paper, magnetic media, and microfilm as methods of filing systems
   - cost factors of records management systems, such as purchasing equipment and supplies, storage space, and labor used in maintaining office records
3. Identify filing equipment:
   - vertical files
   - lateral files
4. Identify filing supplies:
   - guides
   - labels
   - folders
5. Explain the position of guides and folders:
   - primary guides
   - general folders
   - special guides
   - individual folders
6. Tour an office that utilizes various types of filing equipment and supplies.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.4 Retrieve materials or information from files.

PERFORMANCE OBJECTIVE

P1.4 Given requests for retrieval of correspondence or requests for information, a tickler file, and answer sheet, retrieve materials or information from files according to system standard.

PERFORMANCE MEASURE

M1.4 Simulated activity or practice set; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms about procedures for manually retrieving records: *charging out, chronological filing systems, requisitioning, substitution card/outcard checkout form, tickler file,* and *tracing.*
2. Identify charge out-cards, requisition card, and tickler files.
3. Fill out charge-out cards or forms and file in appropriate location.
4. Demonstrate the steps for locating misfiled documents.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.5 File documents in nonelectric alphabetic, geographic, subject, or numeric filing systems.

PERFORMANCE OBJECTIVE

P1.5 Given documents and a practice set filing system with guides and folders, file documents in nonelectric alphabetic, geographic, subject, or numeric filing systems. Filing should be done by inspecting, indexing, coding, sorting, and storing documents properly, as well as cross-referencing requested documents according to system standard.

PERFORMANCE MEASURE

M1.5 Practice set; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the alphabetic indexing rules used by the ARMA.
2. Practice rules using textbook exercises, practice set, or teacher-prepared worksheet.
3. Define selected terms about preparing documents for storage: *caption, chronological filing systems, coding, color-coded label, filing, folder cut, indexing, indexing order, indexing unit, inspecting, record, records management, release mark, score lines,* and *sorting.*
4. Inspect, index, code, sort, and store documents in an alphabetic filing system.
5. Identify subject and geographic filing systems and show examples of locations where these filing systems are used.
6. Inspect, index, code, sort, and store documents in subject and geographic filing systems.
7. Identify numeric filing systems and show examples of locations where this filing system is used.
8. Inspect, index, code, sort, and store documents in numeric filing system.
9. Prepare file folder labels for alphabetic, subject, geographic, and numeric filing systems.
10. Define terms about cross-referencing procedures: *cross-reference guide, cross-reference sheet,* and *cross-referencing.*
11. Explain cross-referencing procedures and prepare cross-reference sheets or files through a practice set or teacher-designed activities.
12. Identify methods about keeping classified/confidential file materials secure and transferring and discarding files. Define related terms: *archive, active records, inactive records,* and *retention schedule.*
13. Tour an office that utilizes various types of filing systems, equipment, and supplies.

DUTY AREA
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
1.6 Maintain employer's appointment calendar.

PERFORMANCE OBJECTIVE
P1.6 Given employer's calendar, list of appointments, cancellations, and employer preferences, maintain employer's appointment calendar according to instructor guidelines. Arrange appointments over a one-month period without overlaps and make list of appointments that need to be confirmed or cancelled.

PERFORMANCE MEASURE
M1.6 Appointment calendar: all items rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Maintain appointment calendars from selected resource(s) and outline main points.
2. Review a vendor's catalog to see the various types of nonelectronic calendars.
3. Explain features that are important when selecting an appointment calendar for yourself and/or employer.
4. Explain the importance of courtesy and tact when having to cancel appointments.
5. Identify how to respond to appointment requests.
6. Role play given situations and tape record conversation.
7. Explain the importance of clarifying points with the manager, such as: extent of authotity in making appointments, establishing blocks of times in which appointments should not be made, keeping informed of appointments made by employer in order to have agreement between employer's and employee's calendars.
8. Identify appointment guidelines outlines.
9. Describe electronic calendars using articles, films, or desktop tools software.

DUTY AREA
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
1.7 Maintain telephone logs.

PERFORMANCE OBJECTIVE
P1.7 Given data from incoming and outgoing telephone calls, maintain telephone logs according to instructor checklist.

PERFORMANCE MEASURE
M1.7 Telephone log; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain need for telephone logs.
2. Identify the reasons for maintaining telephone logs for incoming and outgoing calls.
3. Identify the format and content of the forms on sample logs.
4. Explain procedures for logging incoming and outgoing telephone calls.
5. Complete telephone logs from simulated telephone calls.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.8 Fax information.

PERFORMANCE OBJECTIVE

P1.8 Given document for transmittal, addressee data, and other pertinent information, fax information according to instructor checklist. All pages of the document should be received by the addressee in legible condition, and a cover sheet should be completed accurately and completely.

PERFORMANCE MEASURE

M1.8 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define f*acsimile* (FAX).
2. Explain features of facsimile technology, such as laser or full-color printing, automatic dialing and answering, and autofeed.
3. Outline the steps to transmit information via FAX.
4. Define *cover sheet* and distribute sample *cover sheet* forms.
5. Identify procedures for receiving and distributing incoming FAX messages.
6. Identify tasks included in maintaining FAX machines.
7. Prepare a written report about various FAX machines' features based on information in catalogs.

DUTY AREA	COURSES
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS	Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.9 Duplicate materials on copying machine.

PERFORMANCE OBJECTIVE

P1.9 Given originals of various documents, copying instructions, and the necessary equipment and supplies, duplicate materials on copying machine according to instructor guidelines. Copies should be reproduced legibly and should conform to copying instructions.

PERFORMANCE MEASURE

M1.9 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define terms associated with reprographic systems: *automatic document feed, automatic duplexing, automatic image shift, book copy mode, collating, convenience copiers, desktop publishing, diagnostic functions, electronic copier/printers (intelligent copiers), electrostatic process, enlargement/reduction, imaging, photoconductive, photocopier, phototypesetting, sorter,* and *troubleshooting*.
2. Explain the concepts of the reprographics process, using equipment demonstration or visuals from vendor catalogs:
   - Classify copiers and contrast usage of each capacity.
   - Identify standard copier symbols.
   - Demonstrate a variety of features contained on copiers throughout the school.
   - Analyze copier problems to determine possible solutions.
   - Identify methods of controlling copier supplies and procedures for assuring high-quality copies.
   - Identify guidelines that organizations use for employees making copies.
   - Demonstrate the phototypesetting and desktop publishing processes, showing examples of final copy.
3. Visit your school's office or a local office to observe a demonstration of the features contained on the model being used.
4. Assign Cooperative Office Education students to make a short presentation about the copier(s) they use on their jobs and describe problems they have had with making copies and how they corrected the problems.
5. Demonstrate the use of manufacturers' manuals, documentation, terminology, and other reference materials.
6. Complete a copy from a list of requests.

DUTY AREA
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
1.10 Maintain a bulletin board.

PERFORMANCE OBJECTIVE
P1.10 Given a bulletin board requiring revision and updating, new information to be posted, subject headings, and necessary supplies, maintain a bulletin board according to instructor guidelines. Bulletin board should be organized according to subject headings and spaced neatly so that items are easily recognizable.

PERFORMANCE MEASURE
M1.10 Bulletin board project; all items rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify needs and legal requirements of maintaining bulletin boards.
2. Identify general guidelines to be followed in maintaining bulletin boards:
   - Divide board into sections for each subject, putting subject headings on board.
   - Display materials under appropriate subject headings and write posting date on each new item.
   - Remove out-of-date material from bulletin board.
   - Update and revise information as modifications are made.
   - Check alignment of materials, balancing board and assuring neatness.
3. Visit a business that maintains a well-organized and current bulletin board.
4. Have a speaker talk to the class about the procedures for maintaining a bulletin board using OSHA standards.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Keyboarding (6151), Computer Information Systems (6612), Desktop/ Multimedia Presentations (6630), Notetaking (6241), Advanced Computer Information Systems (6613), Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.11 Key/type alphanumeric information.

PERFORMANCE OBJECTIVE

P1.11 Given access to computer/typewriter, peripherals, software, data disk, and source document(s) of printed material containing alphabetic and numeric information, key/type alphanumeric information according to office standards of speed and accuracy.

PERFORMANCE MEASURE

M1.11 Timed test; rated at 45 words per minute, 1 error per minute of timing

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Practice straight alphabetic and numeric data entry using typewriter or computer.
2. Supervise timings of 1 minute, 3 minutes, or 5 minutes on a regular basis to allow students the opportunity to develop speed and accuracy.
3. Demonstrate the use of the ten-key pad of the microcomputer to input numeric data.
4. Practice entering numeric data using the ten-key pad.
5. Supervise timings on entering numeric data entry using the ten-key pad of the microcomputer.

DUTY AREA
1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
1.12 Maintain office inventories.

PERFORMANCE OBJECTIVE
P1.12 Given an inventory of 10 supplies and/or equipment, blank inventory forms or log books, and requisition forms, maintain office inventories according to system standard. Items on log must be accurately computed and include all necessary data for each item.

PERFORMANCE MEASURE
M1.12 Office inventory log; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Maintain inventories for supplies and equipment based on readings from one or more resources and define related terms: *deplete, inventory, inventory control, inventory record, physical count, purchase requisition,* and *serial number.*
2. Outline main points of inventory control:
   - Explain why it is important to maintain accurate and up-to-date inventories.
   - List basic supplies needed in an office and what data should be recorded for supplies inventory.
   - Identify various methods used to request or order supplies.
   - List the data that should be recorded on inventory records for equipment, frequency of updating, and methods for maintaining inventory.
3. Complete an inventory log of supplies that lists physical count of supplies, maximum quantity to keep on hand for each supply, price of items, etc.
4. Complete worksheet to prepare inventory record for a department within the school.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.13 Update professional manuals.

PERFORMANCE OBJECTIVE

P1.13 Given a manual, replacement pages, revisions, and instructions, update professional manuals (maintain policy and procedures manuals). Revised manual needs to be well organized, consistent in format, and updated according to instructor guidelines.

PERFORMANCE MEASURE

M1.13 Updated professional manual; all items rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Outline general guidelines that should be followed in updating professional manuals.
   - Gather new/revised company policy and procedures document; analyze suggested additions, revisions, or deletions.
   - Review format and contents of the existing manual, ensuring that established organizational policies are consistently followed.
   - Read instructions and determine placement of changes and additions to enable workers to locate needed information quickly.
   - Update manual and reassign appropriate page numbers.
   - Revise the table of contents to reflect changes made to manual.
3. Review Roman Numerals.
4. Revise the table of contents using sample manual and replacement pages.

DUTY AREA

1. PERFORMING FUNDAMENTAL OFFICE OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

1.14 Destroy documents using a shredder.

PERFORMANCE OBJECTIVE

P1.14 Given documents identified for destruction, destroy documents using a shredder. Documents should be completely shredded, and all safety guidelines should be followed.

PERFORMANCE MEASURE

M1.14 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the purposes of an electronic paper shredder.
2. Identify features of paper shredders.
3. Demonstrate the procedure for destroying documents.
4. Outline precautions that should be followed to ensure safe operation of the shredder.
5. Identify documents that should be shredded.
6. Identify tasks included in maintaining paper shredder.
7. Prepare a written report based on information in catalogs about features of various shredders .

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES
(Essential Secondary Tasks)

TASKS/COMPETENCIES

2.1 Maintain checkbook balance.
2.2 Reconcile cash count and receipts.
2.3 Prepare bank deposits.
2.4 Reconcile bank statements.
2.5 Prepare and issue receipts.
2.6 Record general journal entries.
2.7 Post general journal entries to general ledger.
2.8 Prepare a trial balance.
2.9 Prepare income and expense statements.
2.10 Prepare employee payroll records and paychecks.
2.11 Prepare employer payroll tax records.
2.12 Process purchase orders.
2.13 Maintain petty cash fund.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Principles of Business and Marketing (6115), Accounting (6320), Advanced Accounting (6321), and Finance (6120)

TASK/COMPETENCY
2.1 Maintain checkbook balance.

PERFORMANCE OBJECTIVE
P2.1 Given sample blank checks, calculator, and information regarding checkbook balance, maintain checkbook balance with 100% accuracy.

PERFORMANCE MEASURE
M2.1 Balanced checkbook; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the purpose of checks for personal and business financing.
2. Explain individual and joint checking accounts.
3. Define *signature card, check, check register, balance, overdraft,* and *balance-brought-forward.*
4. Explain parts of a typical blank check as well as a completed or authorized check.
5. Explain the importance of endorsements, and select appropriate endorsements for different situations.
6. Explain parts of a check register and stub, and make entries when check is drawn and/or a deposit is made.
7. Describe the process of writing a check manually or with machine.
8. Explain rules for writing checks; e.g., complete register or stub before writing check and write legibly with ink or type everything except the signature.
9. Review addition and subtraction of money to compute balance.
10. Balance check register after each checking account transaction.
11. Explain procedure for voiding a check.
12. Perform practice exercises in writing and endorsing checks and balancing the check register.

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES

COURSES

Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY

2.2 Reconcile cash count and receipts.

PERFORMANCE OBJECTIVE

P2.2 Given a record of total cash and completed receipts, reconcile cash count and receipts. Total cash count must equal total receipts.

PERFORMANCE MEASURE

M2.2 Written test; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Reveiw adding money amounts recorded on worksheet.
2. Arrange cash according to denominations and demonstrate proper technique for adding denominations.
3. Explain the sorting of receipts according to each kind of expense like "Postage."
4. Total all amounts recorded on receipts for each expense account.
5. Explain the calculations needed to total amount of receipts for all expense accounts.
6. Compare total cash with sum of money amounts recorded on all receipts.
7. Define the terms *cash over, cash short,* and *change fund;* indicate when they are applicable.
8. Complete exercises on the review worksheet.

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES

COURSES

Principles of Business and Marketing (6115), Accounting (6320), Advanced Accounting (6321), and Finance (6120)

TASK/COMPETENCY

2.3 Prepare bank deposits.

PERFORMANCE OBJECTIVE

P2.3 Given savings and checking account deposit forms, cash, and/or dated worksheet with cash and/or check information, prepare bank deposits with 100% accuracy. Verify that checks are endorsed, arrange currency, and calculate total deposits.

PERFORMANCE MEASURE

M2.3 Deposit form; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the difference between savings and checking accounts.
2. Explain parts of a deposit form.
3. Explain how to verify that all checks are endorsed.
4. Arrange currency facing the same direction, the smallest denomination placed on top, and continue with largest denomination at the bottom.
5. Show the use of wrappers for storing coins which are also arranged according to denominations.
6. Complete deposit form with given currency, coins and other relevant information.
7. Calculate total deposits.
8. Record deposits on check stubs/register and the deposit slips.

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES

COURSES

Principles of Business and Marketing (6115), Accounting (6320), Advanced Accounting (6321), and Finance (6120)

TASK/COMPETENCY

2.4 Reconcile bank statements.

PERFORMANCE OBJECTIVE

P2.4 Given bank statement, samples of cancelled checks, deposits, reconciliation form or statement, and calculator, reconcile bank statements with 100% accuracy.

PERFORMANCE MEASURE

M2.4 Reconciliation statement; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify parts of a bank statement and recorded entries.
2. Define *debit memo, credit memo, non-sufficient funds, outstanding checks, overdraft*, and *deposit-in-transit.*
3. Explain bank statement, bank reconciliation, and cancelled checks.
4. Arrange cancelled checks in numerical order.
5. Compare cancelled checks with stubs or register to verify amounts.
6. Check off deposits on current statement.
7. Add and subtract money amounts to reconcile bank statement.

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES

COURSES

Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY

2.5 Prepare and issue receipts.

PERFORMANCE OBJECTIVE

P2.5 Given blank receipt forms and information about cash sales/receipts, prepare and issue receipts with 100% accuracy.

PERFORMANCE MEASURE

M2.5 Receipt forms; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Add money amounts for cash received.
2. Define *receipt.*
3. Identify parts of a receipt.
4. Fill in information on receipt form.
5. Describe the use of machines or other methods to prepare receipts.
6. Explain the importance of keeping accurate and clear copies of receipts.
7. Explain the value of initialing written receipts.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY
2.6 Record general journal entries.

PERFORMANCE OBJECTIVE
P2.6 Given accounting transactions and general journal forms, record general journal entries according to instructor guidelines based on system standard.

PERFORMANCE MEASURE
M2.6 General journal forms; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *debit, credit, accounting cycle, journal, general journal, journal entry, journalizing, chart of accounts,* and *book of original entry.*
2. Describe the purpose of the general journal in the accounting cycle.
3. Identify types of source documents.
4. Use addition and subtraction to determine equality of debit and credit entries.
5. Write headings on each journal page and column.
6. Analyze each transaction according to accounts affected, category of account, increased or decreased account balance, and credit or debit entry.
7. Record transactions in general journal in appropriate columns using the correct format.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY
2.7 Post general journal entries to general ledger.

PERFORMANCE OBJECTIVE
P2.7 Given journal entries and ledger form, post general journal entries to general ledger according to instructor guidelines based on system standard.

PERFORMANCE MEASURE
M2.7 General ledger form; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *posting, normal balance,* and *book of final entry.*
2. Explain reasons for posting from general journal to general ledger.
3. Explain *chart of accounts, order of accounts, liquidity, assets,* and *liabilities.*
4. Examine ledger forms and explain manual and electronic posting.
5. Compare information and columns in general journal with information and columns in general ledger and explain the relationships between these two books.
6. Identify items that are transferred in posting to appropriate ledger accounts; i.e., date, debit and credit entries, and page number of journal.
7. Add and subtract money amounts to balance accounts.
8. Explain normal balances in a ledger account.
9. Identify steps when posting; e.g., start with the debit side of first transaction, repeat procedure with the credit side of the same transaction, and continue with the following transactions.
10. Use posting reference column that is included in both the general journal and the general ledger.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY
2.8 Prepare a trial balance.

PERFORMANCE OBJECTIVE
P2.8 Given ledger accounts with entries recorded and trial balance form, prepare a trial balance according to system standard. Entries should be recorded on correct sides, numbers transferred accurately, and total debits should equal total credits.

PERFORMANCE MEASURE
M2.8 Trial balance form and ledger accounts prepared; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *trial balance.*
2. Explain the purpose of the trial balance in the accounting cycle.
3. Demonstrate the steps necessary in preparing a trial balance.
4. Identify steps to be taken if the trial balance does not balance.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY
2.9 Prepare income and expense statements.

PERFORMANCE OBJECTIVE
P2.9 Given trial balance or cash income and expenditure transactions, prepare income and expense according to system standard.

PERFORMANCE MEASURE
M2.9 Income and expense statement; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *financial report, income, expense, statement, net income,* and *net loss.*
2. Explain trial balance and its relationship to the accounting cycle and Income and Expense Statement.
3. Identify parts of a completed income and expense statement.
4. Explain steps in preparing income and expense statement.
5. Do exercises which review steps in recording items accurately.

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DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES

COURSES

Principles of Business and Marketing (6115), Accounting (6320), Advanced Accounting (6321), and Finance (6120)

TASK/COMPETENCY

2.10 Prepare employee payroll records and paychecks.

PERFORMANCE OBJECTIVE

P2.10 Given withholding tables, completed time cards, employee earning records, payroll register, blank checks, and employee payroll information, prepare employee payroll records and paychecks with 100% accuracy. Entries and computations should be accurate and reflect employer policy and tax laws.

PERFORMANCE MEASURE

M2.10 Payroll records and paychecks; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify methods of determining payments to employees.
2. Explain W4 forms, Federal Withholding Tax, and Federal Insurance Contributions Act (FICA).
3. Complete a W4 form.
4. Describe manual and electronic methods of processing payroll.
5. Review addition, subtraction, multiplication, and percentage required in computing the payroll.
6. Compute regular and overtime wages.
7. Determine FICA rate and calculate FICA amounts.
8. Explain how wage bracket tables are used to compute state and federal tax.
9. Demonstrate how to utilize voluntary and involuntary deductions to calculate net salary/wages in payroll register; record, foot, and prove register.
10. Identify the steps used to prepare checks for net earnings.
11. Demonstrate entering data from payroll register to employee earnings record.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Principles of Business and Marketing (6115), Accounting (6320), Advanced Accounting (6321), and Finance (6120)

TASK/COMPETENCY
2.11 Prepare employer payroll tax records.

PERFORMANCE OBJECTIVE
P2.11 Given employee earnings records, worksheet, current pay period data, and tax forms, prepare employer payroll tax records with 100% accuracy.

PERFORMANCE MEASURE
M2.11 Payroll register, general journal, and tax forms; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Complete worksheet columns for payroll date, earnings, federal tax, FICA for employee and employer, total tax, cumulative tax, and deposit due date.
2. Show the relationship between each column of the worksheet and the totals of the current payroll register.
3. Explain FICA for employee and employer.
4. Explain year-to-date and current pay period data.
5. Identify manual and electronic methods of computing tax.
6. Compute tax on worksheet for federal withholding tax, FICA tax, Federal Unemployment tax, and State Unemployment tax.
7. Explain the journalizing of tax expenses.
8. Determine the amount of tax due.
9. Explain when deposits (tax due) should be made and the importance of following instructions related to the deposit process.
10. Complete tax deposit forms.
11. Explain W2 and W3 tax forms.
12. Do worksheet activities to practice computation of tax records.

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES

COURSES

Accounting (6320) and Advanced Accounting (6321)

TASK/COMPETENCY

2.12 Process purchase orders.

PERFORMANCE OBJECTIVE

P2.12 Given authorized requisition, process purchase orders promptly and without error according to instructor guidelines.

PERFORMANCE MEASURE

M2.12 Purchase order form; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the steps that are taken by a company when purchasing goods.
2. Explain *purchase requisition, purchase order,* and *sales invoice.*
3. Examine blank and completed requisition forms for required items.
4. Explain the importance of authorizing requisition forms.
5. Complete purchase order forms.
6. Describe processing purchase order manually or electronically.
7. Explain quotations for items to be purchased.
8. Identify elements on purchase order, e.g., *seller, quantity, description, unit price, total price, shipping method* and *charges*, and *terms.*
9. Explain purpose of making copies of purchase order.
10. Explain value of having purchasing agent sign purchase order and copies.
11. Explain filing copy of purchase order in purchasing and receiving department and sending copy to requisitioner.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSE
Office Administration (6621)

TASK/COMPETENCY
2.13 Maintain petty cash fund.

PERFORMANCE OBJECTIVE
P2.13 Given petty cash fund, stationery, and manual record of computer system, maintain petty cash fund, recording entries in appropriate columns and totaling each column with 100% accuracy. Total of vouchers and remaining cash must equal the original amount of petty cash fund. Manual records must be legible and clean.

PERFORMANCE MEASURE
M2.13 Vouchers, cash payments journal, and petty cash record form; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the terms *petty cash fund, establish fund, replenish fund,* and *voucher.*
2. Examine the elements of petty cash vouchers.
3. Complete petty cash vouchers.
4. Sort petty cash vouchers according to expense accounts affected.
5. Examine completed vouchers and demonstrate how to record entries in appropriate columns of petty cash record, and total each column.
6. Add grand total of expenditure and cash remaining.
7. Total, rule, and prove petty cash record.
8. Explain the relationship among the petty cash fund, petty cash account, and the cash payments journal.
9. Explain how cash is reimbursed by check.
10. Explain how to cash check and place proceeds with petty cash fund.
11. Record reimbursement in cash payments journal and replenish petty cash fund.
12. Explain summary of expenses from petty cash as they are recorded in the journal.

DUTY AREA

3. SUPERVISING OFFICE ACTIVITIES
(Essential Secondary Tasks)

TASKS/COMPETENCIES

3.1 Arrange for hardware repairs and maintenance.
3.2 Maintain software.
3.3 Establish work priorities.
3.4 Log work in and out.
3.5 Maintain production records.
3.6 Develop filing system for processed documents.

DUTY AREA
3. SUPERVISING OFFICE ACTIVITIES

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
3.1 Arrange for hardware repairs and maintenance.

PERFORMANCE OBJECTIVE
P3.1 Given a piece of equipment to be serviced and guidelines for service, arrange for hardware repairs and maintenance according to standards established by instructor. Identify nature of repairs needed, review service contracts, and request cost estimate.

PERFORMANCE MEASURE
M3.1 Case study; rated acceptable according to standards established by instructor

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the nature of repairs needed.
2. Review current service contracts if applicable.
3. Request estimated cost of service if repairs are not on contract.
4. Complete required forms.
5. Establish date, time, and place of service repair.
6. Arrange for transportation of equipment if needed.
7. Notify vendor company or person who is repairing the equipment of service requests.
8. Verify that repairs have been made.
9. Complete case studies in order to arrange for hardware repairs giving written responses and presenting their responses to the class in a short oral presentation.

DUTY AREA
3. SUPERVISING OFFICE ACTIVITIES

COURSES
Computer Applications (6611), Computer Solutions (6610), Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
3.2 Maintain software.

PERFORMANCE OBJECTIVE
P3.2 Given a computer, diskettes, and back-up software with manual, maintain software so that it is backed up on a current basis in accordance with instructor guidelines.

PERFORMANCE MEASURE
M3.2 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *backup*.
2. Describe proper labeling techniques for backup diskettes.
3. Identify procedures for backing up the entire system.
4. Identify procedures for backing up specific files.
5. Explain where to store backup diskettes.
6. Complete a backup of computer.

DUTY AREA
3. SUPERVISING OFFICE ACTIVITIES

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
3.3 Establish work priorities.

PERFORMANCE OBJECTIVE
P3.3 Given a list of tasks, establish work priorities that ensure requests are processed in an organized manner relating to the order of their submission, importance, and urgency in accordance with instructor guidelines. Check incoming basket, calendar, and prepare a daily work schedule.

PERFORMANCE MEASURE
M3.3 Inventory of work priorities; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify reasons for managing your time effectively.
2. Analyze unfinished tasks from the previous day.
3. Check incoming basket.
4. Check calendar for the day's events and also check for upcoming events.
5. Prepare a daily work shedule:
   - Consider complexity of task.
   - Establish logical progression to complete each task.
   - Establish due dates or time limits for each task.
6. Revise the work schedule as new priority tasks are identified.

DUTY AREA
3. SUPERVISING OFFICE ACTIVITIES

COURSES
Word Processing (6625), Desktop/ Multimedia Systems (6630), Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
3.4 Log work in and out.

PERFORMANCE OBJECTIVE
P3.4 Given an assignment to complete, log work in and out according to procedures established by instructor. Log should inlcude all assigned work and contain accurate and complete data for each job.

PERFORMANCE MEASURE
M3.4 Completed log; average or above average rating

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define work log.
2. Identify the need for logging work in and out in order to maintain production levels and establish work priorities.
3. Display work log.
4. Explain where work logs should be kept.
5. Demonstrate how to log work.

DUTY AREA

3. SUPERVISING OFFICE ACTIVITIES

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

3.5 Maintain production records.

PERFORMANCE OBJECTIVE

P3.5 Given records of production and an organizational chart, maintain production records that are up-to-date and complete according to a checklist based on instructor guidelines.

PERFORMANCE MEASURE

M3.5 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define the types of production records and how they are used.
2. Identify types of filing systems that can be used for production records.
3. Identify need for confidentiality in keeping production records.
4. Determine a schedule for revising production records.
5. Describe distribution of certain production records.
6. Define production schedule.
7. Maintain production records and keep a production schedule.

DUTY AREA

3. SUPERVISING OFFICE ACTIVITIES

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

3.6 Develop filing system for processed documents.

PERFORMANCE OBJECTIVE

P3.6 Given manufacturer catalogs/literature, filing books, and notes from interviewing employees and information to be filed, develop filing system for processed documents that is efficient, productive, and cost effective according to instructor guidelines. Account for documents that require confidential filing system.

PERFORMANCE MEASURE

M3.6 Written plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Review alphabetic, numeric, and geographic filing terms.
2. Explain the need to research and analyze all available file classification systems in filing textbooks.
3. Interview with employees who will be working with the filing system.
4. Describe the note-taking process.
5. Research and analyze all available filing equipment and files.
6. Examine current filing systems.
7. Analyze the record's content.
8. Identify what processed documents may need a confidential filing system.
9. Identify what retention schedule there would be for the processed documents.
10. Review any existing filing procedures.
11. Determine the most efficient, cost-effective filing system for the given situation.
12. Prepare a proposal for management on the recommended system.

DUTY AREA

4. SUPERVISING OFFICE PERSONNEL
(Essential Secondary Tasks)

TASKS/COMPETENCIES

4.1 Prepare job description.
4.2 Maintain file of job openings.
4.3 Hire employees.
4.4 Conduct employee training.
4.5 Monitor employee performance.
4.6 Evaluate employee performance.
4.7 Coordinate work schedules.
4.8 Coordinate vacation schedules.
4.9 Assign work to employee.
4.10 Conduct staff meeting.
4.11 Maintain personnel records.
4.12 Promote employee.
4.13 Dismiss employee.

DUTY AREA **COURSE**
4. SUPERVISING OFFICE PERSONNEL — Office Administration I (OFT 243)

TASK/COMPETENCY
4.1 Prepare job description.

PERFORMANCE OBJECTIVE
P4.1 Given information regarding a person's job, prepare job description according to instructor guidelines. Description should contain all the content and essential requirements of specific jobs.

PERFORMANCE MEASURE
M4.1 Written sample of job description; rated in accordance with instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *job analysis* and *job description.*
2. Explain the purpose of a job analysis and job description.
3. Explain the role of the personnel or human resources department in its preparation of job descriptions.
4. Identify the elements in a job description.
5. Examine sample job descriptions for class discussion.
6. Use resources, *Dictionary of Occupational Titles* and *Occupational Outlook Handbook.*

DUTY AREA **COURSE**
4. SUPERVISING OFFICE PERSONNEL — Office Administration II (OFT 244)

TASK/COMPETENCY
4.2 Maintain file of job openings.

PERFORMANCE OBJECTIVE
P4.2 Given list of job openings, maintain file of job openings. This process should include job information related to all departments in the organization and should follow set policies and guidelines outlined by instructor.

PERFORMANCE MEASURE
M4.2 Sample job file; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the role of the personnel or human resources department in recruiting and hiring.
2. Identify regulations for employing workers.
3. Design form on which job openings in various departments of an organization can be listed.
4. Inform all department heads of the procedure and provide them with forms.
5. Open a manual or computer file for job openings.
6. Process and maintain files.
7. Identify the value of policies and guidelines for maintaining files for job openings.
8. Identify methods of storing job recruitment information.

DUTY AREA	**COURSE**
4. SUPERVISING OFFICE PERSONNEL	Office Administration II (OFT 244)

TASK/COMPETENCY
4.3 Hire employees.

PERFORMANCE OBJECTIVE
P4.3 Given job opening information and student applications, recruit and hire employees. Use appropriate techniques to announce job opening, to screen letters of application, to interview applicants, and to make hiring decisions according to instructor guidelines.

PERFORMANCE MEASURE
M4.3 Role-play activity; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain job specifications, recruitment, selection, and placement.
2. Watch a video or film which examines the elements of recruitment, selection, and placement.
3. Explain Equal Employment Opportunity, American Disability Act, and other government regulations affecting the employment process.
4. Identify sources for a pool of employees from which to recruit.
5. Explain the use of tests, background investigations, and medical examinations in the selection process.
6. Videotape interviews, critique, and discuss.
7. Explain interviewer biases and pitfalls.
8. Describe matching interviewees' qualifications to job opening requirements.
9. Identify variables to be considered when making hiring decisions.
10. Develop case studies which demonstrate the recruitment, selection, and placement processes.

DUTY AREA	**COURSE**
4. SUPERVISING OFFICE PERSONNEL	Office Administration II (OFT 244)

TASK/COMPETENCY
4.4 Conduct employee training.

PERFORMANCE OBJECTIVE
P4.4 Given training needs and employees, conduct employee training by developing appropriate training program to meet the needs of the organization in accordance with instructor guidelines.

PERFORMANCE MEASURE
M4.4 Written test; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *training.*
2. Explain the benefits of training.
3. Assess needs to determine training needs.
4. Examine needs assessment questionnaire used for training in some organizations.
5. Describe common training methods.
6. Describe cross training.
7. Identify appropriate training methods for specific training needs.
8. Identify trainee, training method, and training content.
9. List training venues.
10. Identify appropriate training location and hours of training.
11. Communicate training information with trainee supervisors, trainees, and trainers.
12. Develop evaluation form to be used by trainees to evaluate training session(s).
13. Use case studies to reinforce concepts and elements of training.

DUTY AREA **COURSE**
4. SUPERVISING OFFICE PERSONNEL — Office Administration I (OFT 243)

TASK/COMPETENCY
4.5 Monitor employee performance.

PERFORMANCE OBJECTIVE
P4.5 Given evaluation form, monitor employee performance using notes and documents. Monitoring should be periodic, consistent, and objective, and should follow instructor guidelines.

PERFORMANCE MEASURE
M4.5 Case study and worksheet; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the role of the evaluation form in monitoring employee performance.
2. Explain the evaluation form.
3. Identify criteria and scoring scale used on form.
4. Explain the importance of using notes to record exceptional or poor performance.
5. Identify documents that should be placed into files dealing with commending or criticizing employee performance.
6. Explain the importance of basing all observation and recordings on the same criteria and rating scale.
7. Explain the problems of supervising friends and/or relatives.

DUTY AREA **COURSE**
4. SUPERVISING OFFICE PERSONNEL — Office Administration II (OFT 244)

TASK/COMPETENCY
4.6 Evaluate employee performance.

PERFORMANCE OBJECTIVE
P4.6 Given evaluation form and observation notes, evaluate employee performance using documentation. Evaluation should be periodic, consistent, and objective, and should be done according to instructor guidelines.

PERFORMANCE MEASURE
M4.6 Case study and evaluation form; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define performance *appraisal/evaluation.*
2. Identify the advantages of employee evaluation to the organization and to the employee.
3. Identify standards of performance and compare with rating scale on evaluation form.
4. Establish frequency of evaluation in organizations.
5. Explain why previous documentation of observation records and other pertinent information on each employee should be maintained.
6. Explain how documentation is used to complete evaluation form and rate employee fairly with assigned scales.
7. Explain problems in rating performance by different supervisors.
8. Explain weaknesses of performance evaluation forms.
9. Examine variety of evaluation forms.
10. Explain reviewing the evaluation form with the employee.
11. Explain the importance of obtaining employee signature on completed evaluation form.
12. Use worksheet and questions to review concepts introduced.

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DUTY AREA
4. SUPERVISING OFFICE PERSONNEL

COURSE
Office Administration II (OFT 244)

TASK/COMPETENCY
4.7 Coordinate work schedules.

PERFORMANCE OBJECTIVE
P4.7 Given employee working hours, company scheduling guidelines, and employee preference, coordinate work schedules according to instructor guidelines. Work schedules should be coordinated to enable smooth, cost-effective work flow.

PERFORMANCE MEASURE
M4.7 Company work schedules; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain task analysis, work distribution, and work schedules.
2. Explain Fair Labor Standards Act (also called Wage and Hours Law).
3. Explain compressed workweek, staggered work schedule, and flexible work schedule.
4. Identify the positive and negative features of each type of work schedule.
5. Identify work schedules used at particular organization.
6. Demonstrate how to determine number of workers to be scheduled and prepare a grid or software to include hours of work and employees' names.
7. Explain the advantage of scheduling workers fairly, and where possible allowing employees to work at preferred times.
8. Demonstrate the steps in scheduling work.
9. Describe handling employees' reactions to work schedules.

DUTY AREA
4. SUPERVISING OFFICE PERSONNEL

COURSE
Office Administration II (OFT 244)

TASK/COMPETENCY
4.8 Coordinate vacation schedules.

PERFORMANCE OBJECTIVE
P4.8 Given preferred vacation period(s) and available vacation periods, coordinate vacation schedules according to instructor guidelines. The schedules should result in maintaining the productivity level.

PERFORMANCE MEASURE
M4.8 Sample vacation schedule; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the advantages of vacations to employees and employers.
2. Identify the positive and negative features of giving extra pay in lieu of vacation.
3. Determine method of identifying vacation periods available.
4. Outline systems used by different companies to determine when and what vacations are due to each employee.
5. Explain how preferred vacation periods are obtained from each employee.
6. Outline the steps in scheduling vacations.
7. Schedule vacation for given number of persons.
8. Review using worksheets and discussions.
9. Describe methods of handling employees' positive and negative reactions to vacation schedules.

DUTY AREA
4. SUPERVISING OFFICE PERSONNEL

COURSE
Office Administration II (OFT 244)

TASK/COMPETENCY
4.9 Assign work to employee.

PERFORMANCE OBJECTIVE
P4.9 Given names, hours of work, and workload, assign work to employees. Work should be assigned to facilitate smooth work flow and high productivity in accordance with instructor guidelines.

PERFORMANCE MEASURE
M4.9 Work assignment sheet; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain work-flow analysis.
2. Prepare work-flow chart.
3. Determine performance of each employee being supervised.
4. Identify tasks to be performed.
5. Explain work distribution charts which show the relationship between personnel and tasks to be performed.
6. Prepare work flow and distribution charts.
7. Identify the advantages of recording assignments to each employee.
8. Communicate with employees' regarding their work schedules.
9. Assign worksheets to students containing practice exercises.

DUTY AREA
4. SUPERVISING OFFICE PERSONNEL

COURSE
Office Administration II (OFT 244)

TASK/COMPETENCY
4.10 Conduct staff meeting.

PERFORMANCE OBJECTIVE
P4.10 Given content for meeting, conduct staff meeting. All staff members should be asked to attend the meeting, and an agenda should be prepared to discuss all relevant matters. Meeting should be conducted according to instructor guidelines.

PERFORMANCE MEASURE
M4.10 Group role-play activity; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the purpose of staff meetings.
2. Explain the difference between arranging small and large meetings.
3. Identify elements to be considered when planning a meeting; e.g., number of persons, location, seating arrangements, equipment, informing participants, supplies, and refreshments.
4. Explain the purpose and preparation of an agenda.
5. Describe last-minute details to consider before a meeting and organize meeting materials and handouts.
6. Identify the duties of a chairperson and officers.
7. Explain the function of committees.
8. Explain parliamentary procedures and methods of conducting a business meeting.
9. Explain follow-up activities.
10. Role play to review and reinforce specific elements.

DUTY AREA
4. SUPERVISING OFFICE PERSONNEL

COURSE
Office Administration II (OFT 244)

TASK/COMPETENCY
4.11 Maintain personnel records.

PERFORMANCE OBJECTIVE
P4.11 Given personnel records and record system, maintain personnel records according to instructor guidelines. Date new materials as added to file and file all documents that relate to performance, habit, and attitude. Ensure confidentiality of records, yet accessibility to those who need them.

PERFORMANCE MEASURE
M4.11 Case study with personnel record; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of personnel policy.
2. Identify reasons for confidentiality of personnel records.
3. Identify the record system and security measures for manual or electronically stored records.
4. Explain how a personnel file should be set up for each employee according to policy.
5. Date new materials as they are added to file.
6. Assemble all documents that relate to employee's work performance, habit, and attitude in the file.
7. Identify personnel documents that should be stored at central and departmental locations.
8. Identify the importance of maintaining personnel records for performance evaluations, promotions, etc.
9. Review concepts and practices through worksheets and discussion.

DUTY AREA
4. SUPERVISING OFFICE PERSONNEL

COURSE
Office Administration II (OFT 244)

TASK/COMPETENCY
4.12 Promote employee.

PERFORMANCE OBJECTIVE
P4.12 Given employee performance and job vacancy, promote employee by identifying relevant elements of promotion according to instructor guidelines. Each applicant should be judged by the same criteria.

PERFORMANCE MEASURE
M4.12 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *promotion.*
2. Identify factors that influence promotions in an organization.
3. Explain the importance of developing a promotion program or system as well as definite channels of promotion.
4. Identify elements of promotion programs like policy, promotion channels, selection and appraisal (include criteria for promotion), training and development, communication, and coordination of records.
5. Identify employee's performance potential based on promotion criteria.
6. Identify problems with promotions; e.g., disappointed candidates, those who refuse promotion, supervisor not releasing the employee, promotion opportunities not equitable.
7. Identify steps to be taken before announcing a promotion.
8. Discuss the announcement.
9. Demonstrate elements and steps by using case studies for practice activities.

DUTY AREA	**COURSE**
4. SUPERVISING OFFICE PERSONNEL	Office Administration I (OFT 244)

TASK/COMPETENCY

4.13 Dismiss employee.

PERFORMANCE OBJECTIVE

P4.13 Given specific employee problems, identify techniques to dismiss employees. Dismissal should reflect compliance with company policy.

PERFORMANCE MEASURE

M4.13 Checklist with case study; acceptable score based on company policy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain Equal Employment Opportunity provisions of the Civil Rights Act, the National Labor Relations Act, and other relevant government regulations that relate to dismissal.
2. Explain the role of unions, civil service systems, and protective labor laws that specify that workers can be discharged only for "just cause."
3. Explain factors in organizations that cause job changes like dismissal.
4. Write a set of policies and guidelines for handling the termination of employees.
5. Explain how to communicate to the employee that they have been dismissed.
6. Review through case studies.

DUTY AREA

5. PREPARING AND DISTRIBUTING DOCUMENTS/INFORMATION
(Essential Secondary Tasks)

TASKS/COMPETENCIES

5.1 Prepare a spreadsheet document.
5.2 Prepare a word processing document.
5.3 Prepare a database document.
5.4 Prepare a graph.
5.5 Prepare a desktop publishing document.
5.6 Communicate using electronic mail.
5.7 Prepare a merge document.
5.8 Prepare a standardized document.
5.9 Distribute prepared documents.

DUTY AREA

5. PREPARING AND DISTRIBUTING DOCUMENTS/INFORMATION

COURSES

Computer Applications (6611), Keyboarding (6151), Computer Solutions (6610), and Computer Information Systems (6612)

TASK/COMPETENCY

5.1 Prepare a spreadsheet document.

PERFORMANCE OBJECTIVE

P5.1 Given access to a computer, spreadsheet software, and data to compute, prepare a spreadsheet document. The spreadsheet layout should be attractive, all computations should be accurate, and document should be prepared according to instructor checklist.

PERFORMANCE MEASURE

M5.1 Spreadsheet document; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define the following terms: *cell, column and row, label, spreadsheet, value, range, function, absolute value, global, relative cell, window,* and *protect and unprotect.*
2. Plan the spreadsheet layout on paper.
3. Start and exit the spreadsheet program.
4. Describe the worksheet layout.
5. Move around the spreadsheet.
6. Create simple spreadsheets:
    - Enter labels.
    - Enter values.
    - Enter a simple formula.
7. Edit spreadsheets:
    - Erase contents in a cell or range.
    - Move contents in a cell or range.
8. Access the help function.
9. Enhance spreadsheet by using formatting features:
    - Make column widths for one or more columns.
    - Format cell or range of cells.
    - Use windows.
    - Hide columns from display.
10. Explain using relative and absolute cell addressing.
11. Enter formulas using parentheses, cell addresses, ranges, and functions:
    - Use addition of cells.
    - Use subtraction of cells.
    - Use multiplication of cells.
    - Use division of cells.
    - Use combination of computations.
12. Copy a cell, range of cells, and formulas.
13. Explain *protecting* and *unprotecting* in a worksheet.
14. Describe printing a worksheet: as-displayed, cell formula, and using add-in programs such as Always or WYSIWYG.
15. Describe the proper procedures for saving spreadsheets.
16. Retrieve a spreadsheet file.
17. Complete beginning, intermediate, and advanced spreadsheets utilizing each of the above techniques.

DUTY AREA

5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSES

Keyboarding (6151), Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Desk top/Multimedia Presentations (6630), Legal Systems Administration (6735), Medical Systems Administration (6730), Office Administration (6621), and Word Processing (6625)

TASK/COMPETENCY

5.2 Prepare a word processing document.

PERFORMANCE OBJECTIVE

P5.2 Given access to a computer, word processing software, and an unformatted document, prepare a word processing document that meets acceptable mailability standards.

PERFORMANCE MEASURE

M5.2 Word processing document; all items rated acceptable according to mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Enter and exit a word processing program.
2. Describe the template.
3. Describe the default settings.
4. Describe the screen (window).
5. Explain the HELP function.
6. Key a document.
7. Define *word wrap.*
8. Use boldface in a document.
9. Center a document.
10. Move text flush right.
11. Use underline in a document.
12. Define *insert/typeover mode.*
13. Delete text:
    - blocking and deleting
    - using the backspace key
    - using the delete key
14. Change margins.
15. Change tabs.
16. Change line spacing.
17. Change top and bottom margins.
18. Explain page formatting.
19. Create headers and footers.
20. Describe a file management system.
21. Use the spell check feature.
22. Print the document.
23. Describe proofreading procedures which detect errors.
24. Edit the document for errors.
25. Save the document.
26. Retrieve a document.
27. Key business correspondence, using the word processing features above.

DUTY AREA
5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSES
Keyboarding (6151), Computer Applications (6611), Computer Solutions (6610), and Computer Information Systems (6612)

TASK/COMPETENCY
5.3 Prepare a database document.

PERFORMANCE OBJECTIVE
P5.3 Given access to a computer, database software, and information to organize, prepare a database document according to instructor checklist. The database should be prepared so that requested information can be searched for and necessary calculations performed.

PERFORMANCE MEASURE
M5.3 Database document; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define: *record, alphanumeric field, ascending/descending order, browse, database, date field, field, index, logical field, numeric field, primary/secondary sort key, report, sort, view* and *search condition.*
2. Create a database:
   - Name fields.
   - Edit field names.
3. Save the database file.
4. Modify the database.
5. Enter data.
6. Explain procedures for editing data.
7. Search a database:
   - Start the search.
   - Use wild cards in the search.
8. Sort a database.
9. For Microsoft Works for Windows:
   - Discuss changing database formats.
   - Protect a database.
10. Use database queries and identify their symbols:
    - = equal to
    - > greater than
    - < less than
    - > = greater than or equal to
    - < = less than or equal to
    - < > not equal to
11. Create view in a database.
12. Create reports.
13. Print hard copies and reports of a database.

DUTY AREA

5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSES

Keyboarding (6151), Computer Applications (6611), Computer Solutions (6610), and Computer Information (6612)

TASK/COMPETENCY

5.4 Prepare a graph.

PERFORMANCE OBJECTIVE

P5.4 Given access to a computer, graphic software, and information on a graph, prepare a graph. The graph should be attractive and all information should be accurate according to instructor checklist.

PERFORMANCE MEASURE

M5.4 Graph; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the types of graphs.
2. Enter graphics program.
3. Determine the x axis of the graph.
4. Determine the y axis of the graph.
5. Select the correct graph type.
6. Identify titles for the x axis.
7. Identify titles for the y axis.
8. Identify main title and subtitles for the graph.
9. Enter labels and values.
10. Resize the graph.
11. Create legends for the graph.
12. Change text size and attributes to enhance the graph's appearance.
13. Create different graphs:
    - pie chart
    - line graph
    - bar graph
14. Print the graph.
15. Save the graph.
16. Edit the graph.
17. Exit graphics program.
18. Create different types of pie, line, and bar graphs.

DUTY AREA
5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSES
Desktop/Multimedia Presentations Presentations (6630), and Word Processing (6625)

TASK/COMPETENCY
5.5 Prepare a desktop publishing document.

PERFORMANCE OBJECTIVE
P5.5 Given access to a computer, desktop publishing software, and specific information on a document, prepare a desktop publishing document. The document should be a camera-ready copy ready for duplication prepared according to instructor guidelines.

PERFORMANCE MEASURE
M5.5 Desktop publishing document; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define the types of desktop publishing documents.
2. Enter a desktop publishing program.
3. Describe the program (screen layout).
4. Identify the location of needed keys.
5. Identify the mouse and its uses.
6. Explain the drop-down menus.
7. Identify the default page setup.
8. Change the page setup.
9. Import documents from other software.
10. Retrieve a clip art file.
11. Revise the appearance of the document.
12. Demonstrate column changes.
13. Edit documents to make changes.
14. Change margin settings.
15. Demonstrate the use of lines:
    - vertical
    - horizontal
    - shaded
16. Create various desktop publishing documents:
    - flyers
    - brochures
    - newsletters
17. Print the desktop publishing documents.
18. Save the document.
19. Explain the importance of editing and proofreading the document.
20. Exit desktop publishing program.
21. Create desktop publishing documents and make an oral presentation of documents using a portfolio.

DUTY AREA

5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSES

Keyboarding (6151), Computer Applications (6611), Computer Solutions (6610), and Computer Information Systems (6612)

TASK/COMPETENCY

5.6 Communicate using electronic mail.

PERFORMANCE OBJECTIVE

P5.6 Given access to a computer, electronic mail software, and specific information to send or receive, communicate using electronic mail. The message should be sent or received with 100% accuracy.

PERFORMANCE MEASURE

M5.6 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define the types of electronic mail used in today's business world.
2. Access electronic mail or start the communication session.
3. Identify important keys and functions to be used in the electronic mail.
4. Type a document to be sent.
5. Save or delete the document you are sending.
6. Send the document.
7. Receive a document.
8. Delete or save a document that has been sent.
9. Identify the problems with privacy when using electronic mail.
10. Exit the electronic mail software.
11. Access the Internet if possible.

DUTY AREA

5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSE

Word Processing (6625)

TASK/COMPETENCY

5.7 Prepare a merge document.

PERFORMANCE OBJECTIVE

P5.7 Given access to a computer, word processing software, primary document to be merged, and merge variables, prepare a merge document. The merged documents should meet mailability standards.

PERFORMANCE MEASURE

M5.7 Merge document; all items rated acceptable according to mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Enter the word processing software.
2. Explain the reason for merging documents.
3. Define *primary file.*
4. Define *secondary file.*
5. Illustrate the correct procedures for typing and saving the primary file.
6. Illustrate the correct procedures for typing and saving the secondary file.
7. Merge the documents.
8. Print the documents.
9. Save the merged documents.
10. Exit the word processing software.
11. Merge primary and secondary file.

DUTY AREA

5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSE

Word Processing (6625)

TASK/COMPETENCY

5.8 Prepare a standardized document.

PERFORMANCE OBJECTIVE

P5.8 Given access to a computer, word processing software, and document to be used repetitively, prepare a standardized document. The document should meet mailability standards.

PERFORMANCE MEASURE

M5.8 Standardized document; all items rated acceptable according to mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Enter the word processing software.
2. Explain the reason for a standardized document.
3. Illustrate the correct procedures for typing the standardized document.
4. Choose a name for saving the standardized document.
5. Use the standardized document.
6. Print the document.
7. Explain the importance of editing and proofreading the document.
8. Save the document under a name other than the standardized document.
9. Exit the word processing software.

DUTY AREA

5. PREPARE AND DISTRIBUTE DOCUMENTS/INFORMATION

COURSES

Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

5.9 Distribute prepared documents.

PERFORMANCE OBJECTIVE

P5.9 Given a distribution list and documents to be distributed, distribute prepared documents to individuals on the distribution list. Distribution should be made according to instructor checklist.

PERFORMANCE MEASURE

M5.9 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Illustrate proper copying procedures of prepared documents including collating and binding.
2. Count the prepared documents to ensure that enough copies were made.
3. Keep a file copy for future reference if necessary.
4. Type the distribution list.
5. Print the distribution list.
6. Save the distribution list for future use.
7. Explain color coding or marking the distribution list in order to ensure that everyone has received a copy of the prepared document.
8. Distribute documents in a timely manner by keeping in mind the locations of the people on the distribution list.
9. File the original document.

DUTY AREA

6. MAINTAINING COMPUTER FILE
(Essential Secondary Tasks)

TASKS/COMPETENCIES

6.1 Format diskette.
6.2 Rename file.
6.3 Maintain backup file.
6.4 Delete unneeded file from storage.
6.5 Create user sub-directory.
6.6 Maintain user directory.
6.7 Update spelling dictionary.

DUTY AREA
6. MAINTAINING COMPUTER FILE

COURSES
Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Office Administration (6621), Word Processing (6625), Desktop Publishing/Multimedia Presentations (6630), and Keyboarding (6151)

TASK/COMPETENCY
6.1 Format diskette.

PERFORMANCE OBJECTIVE
P6.1 Given a computer, DOS and/or Windows environment, and a diskette to format, format diskette with 100% accuracy. Disk should be checked to ensure it meets quality specifications and is ready to receive data.

PERFORMANCE MEASURE
M6.1 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the reason for formatting diskettes.
2. Describe the types of diskettes.
3. Review booting computer if necessary.
4. Explain the use of labels on diskettes.
5. Format a diskette using a DOS and/or Windows environment.
6. Exit from formatting diskette.
7. Write labels for formatted diskettes.

DUTY AREA
6. MAINTAINING COMPUTER FILE

COURSES
Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Office Administration (6621), Word Processing (6625), Desktop Publishing/Multimedia Presentations (6630), and Keyboarding (6151)

TASK/COMPETENCY
6.2 Rename file.

PERFORMANCE OBJECTIVE
P6.2 Given a computer and a file to rename, rename file in the DOS and/or Windows environment with 100% accuracy. Listing should indicate that the file was renamed.

PERFORMANCE MEASURE
M6.2 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the reason for renaming a file.
2. Review procedures for booting the computer.
3. Rename a file in the DOS and Windows environment.
4. Identify the procedures for checking to see that the file has been renamed correctly.

DUTY AREA
6. MAINTAIN COMPUTER FILE

COURSES
Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6613), Office Administration (6621), Word Processing (6625), Desktop Publishing/Multimedia Presentations (6630), and Keyboarding (6151)

TASK/COMPETENCY
6.3 Maintain backup file.

PERFORMANCE OBJECTIVE
P6.3 Given a computer, a file to copy, and diskettes, maintain backup file that contains all required records with 100% accuracy

PERFORMANCE MEASURE
M6.3 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *backup file, source file,* and *target file.*
2. Review procedures for booting computer.
3. Copy files and/or diskettes in the DOS and/or Windows environment:
   - Copoy files from one diskette to another.
   - Copy to the default disk.
   - Copy files to the same diskette.
4. Explain the messages that may appear during this procedure.

DUTY AREA
6. MAINTAINING COMPUTER FILE

COURSES
Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Office Administration (6621), Word Processing (6625), Desktop Publishing/Multimedia Presentations (6630), and Keyboarding (6151)

TASK/COMPETENCY
6.4 Delete unneeded file from storage.

PERFORMANCE OBJECTIVE
P6.4 Given disk or directory that contains outdated file, delete unneeded file from storage with 100% accuracy. Directory listing should show that file no longer exists.

PERFORMANCE MEASURE
M6.4 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the need to periodically delete unneeded files/documents.
2. Review procedures for booting computer.
3. Explain why caution should be used when deleting files.
4. Delete files in the DOS and Windows environment.
5. Explain the necessity of checking directory to confirm the deletion of unneeded file.

DUTY AREA
6. MAINTAINING COMPUTER FILE

COURSES
Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Office Administration (6621), Word Processing (6625), Desktop Publishing/Multimedia Presentations (6630), and Keyboarding (6151)

TASK/COMPETENCY
6.5 Create user sub-directory.

PERFORMANCE OBJECTIVE
P6.5 Given a group of files, create user sub-directory with 100% accuracy. Sub-directory should be organized so that files are categorized into related group.

PERFORMANCE MEASURE
M6.5 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *root directory* and *sub-directory.*
2. Identify the need to group similar files together in a directory.
3. Review procedures for booting the computer.
4. Create a user sub-directory in the DOS and Windows environment.
5. Check root directory to confirm the creation of the sub-directory.
6. Change from one directory to another.

DUTY AREA
6. MAINTAINING COMPUTER FILE

COURSES
Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Office Administration (6621), Word Processing (6625), Desktop Publishing/Multimedia Presentations (6630), and Keyboarding (6151)

TASK/COMPETENCY
6.6 Maintain user directory.

PERFORMANCE OBJECTIVE
P6.6 Given a user directory, maintain user directory according to instructor checklist. Directory should be updated on a periodic basis, evaluating files that need to be deleted, and should enable user to access needed files quickly.

PERFORMANCE MEASURE
M6.6 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Access directories in the DOS and/or Windows environment.
2. View directories in the DOS and/or Windows environment.
3. Evalute files that need to be deleted.
4. Delete files in the DOS and/or Windows environment.
5. Copy files to other directories in the DOS and/or Windows environment.
6. Identify the need to periodically review and maintain user directories.
7. Complete exercises in maintaining user directory in the DOS and/or Windows environment.

DUTY AREA

6. MAINTAINING COMPUTER FILE

COURSE

Word Processing (6625)

TASK/COMPETENCY

6.7 Update spelling dictionary.

PERFORMANCE OBJECTIVE

P6.7 Given word processing software, software manual, and a list of words, update spelling dictionary according to instructor guidelines. Words added should be spelled correctly and should include proper nouns and terminology.

PERFORMANCE MEASURE

M6.7 Student demonstration; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the need to update the spelling dictionary.
2. Identify the procedures in the software manual for updating the spelling dictionary.
3. Keep a running list of words that need to be added to the spelling dictionary.
4. Use slack time to add words to the spelling dictionary.
5. Update spelling dictionary.

DUTY AREA

7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS
(Essential Secondary Tasks)

TASKS/COMPETENCIES

7.1 Prepare camera-ready copy for duplication.
7.2 Coordinate schedule for courier service.
7.3 Make travel arrangements and reservations.

DUTY AREA

7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

7.1 Prepare camera-ready copy for duplication.

PERFORMANCE OBJECTIVE

P7.1 Given machines, master, and paper, prepare camera-ready copy for duplication in accordance with system standard. Copy should be appropriately vertical and horizontal with clear, sharp characters. There should be no ink spots or creases.

PERFORMANCE MEASURE

M7.1 Camera-ready copy for duplication; acceptable score based on system standard

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Outline the history of duplicating processes–fluid, spirit, and offset duplication.
2. Identify current methods of duplication.
3. Describe the types of masters used with copiers.
4. Describe the advantages of using desktop publishing in producing masters.
5. Identify elements of a good master.
6. Describe the procedures to produce professional masters.
7. Produce professional masters for different methods of duplication.
8. Identify the kinds of materials that must never be copied and the copyright law.
9. Do practice exercises in producing high-quality masters.

DUTY AREA

7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

7.2 Coordinate schedule for courier service.

PERFORMANCE OBJECTIVE

P7.2 Given packages, coordinate schedule for courier service according to instructor guidelines. Sort items to be sent by courier service according to company, overnight, same-day, or other services. Packages should be delivered to addressee according to specified time.

PERFORMANCE MEASURE

M7.2 Schedule arranged; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain courier service.
2. Compare courier service with regular postal service.
3. Compile list of companies that provide courier service.
4. Store envelopes and forms from selected companies for packaging items.
5. Sort items to be sent by courier service according to company, overnight, same-day, or other services.
6. Discuss criteria used for determining whether items should be delivered or picked up.
7. Explain the cost effectiveness of using courier service.
8. Review services using case studies.

DUTY AREA	**COURSES**
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS	Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

7.3 Make travel arrangements and reservations.

PERFORMANCE OBJECTIVE

P7.3 Given travel plans, make travel arrangements and reservations in accordance with instructor guidelines. Itinerary should reflect all travel plans.

PERFORMANCE MEASURE

M7.3 Final copy of itinerary; rated acceptable according to criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the types of information needed for an executive's travel plans.
2. Identify methods of travel.
3. Make hotel reservations.
4. Identify criteria for selecting the quickest and most cost-effective method of traveling.
5. Outline the advantages and disadvantages of using travel agencies.
6. Identify health regulations for country to be visited.
7. Prepare an itinerary.
8. Examine sample company travel policy and procedures.
9. Examine travel document forms that are submitted for company travel.
10. Develop a reminder system to ensure that all tasks are completed and all appointments are confirmed.
11. Explain the advantages of giving executive a copy of travel itinerary prior to the date of travel.
12. Explain the value of confirming travel arrangements a few days before travel time.
13. Complete worksheets to review concepts and procedures.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION
(Essential Secondary Tasks)

TASKS/COMPETENCIES

8.1 Compose routine correspondence at the computer.
8.2 Verify information.
8.3 Interpret data on charts, graphs, illustrations, tables, and other visual aids.
8.4 Compose abstracts of articles and/or reports.
8.5 Process specialized documents.
8.6 Handle an outgoing telephone call.
8.7 Handle an incoming telephone call.
8.8 Process messages using voice mail.
8.9 Take accurate notes.
8.10 Participate in teleconference.
8.11 Prepare an oral presentation for delivery.
8.12 Participate in the exchange of ideas within small and large groups.
8.13 Apply decision-making techniques to solve problems.
8.14 Handle customer relations.
8.15 Transcribe from recorded media.
8.16 Conduct tour of information processing operations.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), Office Administration, (6621), Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Business Law (6131), Business Management (6135), Make It Your Business (6110), and Notetaking (6241)

TASK/COMPETENCY
8.1 Compose routine correspondence at the computer.

PERFORMANCE OBJECTIVE
P8.1 Given correspondence or inquiries to answer, information regarding the intended message to be conveyed, and the necessary equipment and supplies, compose routine correpondence at the computer according to instructor guidelines. The message must be clearly communicated, and the final copy must have no spelling, punctuation, or grammatical errors.

PERFORMANCE MEASURE
M8.1 Final copy of correspondence; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Read about composition of routine office correspondence, outlining main points.
2. Identify importance of written communication and its uses in business:
   - Describe what is meant by adopting a "you-attitude."
   - Identify advantages of written communications.
   - Describe the importance of being aware of using words correctly.
   - Explain the characteristics of effective writing: courtesy, consideration, clarity, conciseness, concreteness, completeness, and correctness.
   - List the steps to be followed in composing correspondence.
   - Describe major types of correspondence prepared in an office.
3. Determine the intended message and major points from a collection of correspondence. Identify each document's strengths and weaknesses and make suggestions for improvement.
4. Given needed information, identify the best type of correspondence for the situation, outline the major points to be communicated, and prepare correspondence.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), Office Administration (6621), Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Business Law (6641), Business Management (6135), Make It Your Business (6110), and Notetaking (6241)

TASK/COMPETENCY

8.2 Verify information.

PERFORMANCE OBJECTIVE

P8.2 Given reference materials and 10 requests, locate and verify information according to specific guidelines set forth by instructor.

PERFORMANCE MEASURE

M8.2 Student worksheet; acceptable score based on criteria specified in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of locating information quickly and accurately.
2. Identify methods for reading with comprehension and interpreting requests.
3. Locate and verify information:
   - Identify pertinent information.
   - Compile and outline information as instructed.
   - Record sources of information to be used in a bibliography.
   - Present information in a logical order.
4. Provide activities that will enable students to access information and answer inquiries (examples: Civil Service practice sets, filing simulations, machine manuals, software manuals).

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Office Administration (6621), Computer Applications (6611), Computer Solutions (6610), and Computer Information Systems (6612)

TASK/COMPETENCY
8.3 Interpret data on charts, graphs, illustrations, tables, and other visual aids.

PERFORMANCE OBJECTIVE
P8.3 Given charts, graphs, illustrations, tables, and other visual aids, interpret data on charts, graphs, illustrations, tables, and other visual aids by explaining what the item portrays and/or by answering specific questions related to the data. Data must be correctly analyzed and explained and/or questions must be answered correctly according to instructor guidelines.

PERFORMANCE MEASURE
M8.3 Written test; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Illustrate a variety of charts and graphs, such as:
    - pie chart
    - line graph
    - multi-line graph
    - stack bar graph
    - XY graphs
    - scatter graph
    - bar graph
    - side-by-side bar graph
    - tables
2. Present various illustations or visual aids, such as pictures from machine manuals, and ask questions related to drawings.
3. Distribute tables to students, explain how to interpret data contained within table, and have students answer questions related to data.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), Office Administration (6621), Business Law (6131), Business Management (6135), and Make It Your Business (6110)

TASK/COMPETENCY

8.4 Compose abstracts of articles and/or reports.

PERFORMANCE OBJECTIVE

P8.4 Given an article or report and abstract form, compose abstracts of articles and/or reports using clear and concise language to summarize main points in accordance with instructor guidelines.

PERFORMANCE MEASURE

M8.4 Final copy of abstract; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *abstract, descriptive abstract,* and *summarizing abstract.*
2. Explain the purpose of an abstract.
3. Outline the steps for preparing abstracts and the various methods employed in highlighting and/or outlining main points.
4. Distribute samples of completed abstracts and verbally critique them.
5. Distribute abstract report forms and discuss each section on the form.
6. Identify the correct method for recording the source on the abstract report.
7. Distribute article and abstract report form to students and work through abstracting procedure together.
8. Assign article(s) or report(s) to students to abstract individually. Provide written or oral feedback of completed abstracts.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Word Processing (6625) and
Desktop Publishing/Multimedia
Presentations (6630)

TASK/COMPETENCY
8.5 Process specialized documents.

PERFORMANCE OBJECTIVE
P8.5 Given information for a specific event, process specialized documents according to instructor guidelines. Document may be in the form of a newsletter, brochure, or flyer. Document must contain all relevant information and conform to specifications.

PERFORMANCE MEASURE
M8.5 Final copy of document; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify purpose of specialized documents, such as newsletters, brochures, and flyers.
2. Explain key elements that should be incorporated into the writing of these specialized documents:
   - specific names, dates, etc.
   - graphics or themes that should be used
   - layout of text and graphics
3. Illustrate principles of effective and ineffective layouts and designs:
   - Arrange the document attractively.
   - Format the document correctly.
4. Explain importance of accurate proofreading.
5. Prepare specialized documents.
6. Identify methods of distribution:
   - using distribution list
   - color coding or marking the distribution list
   - using large boxes, files, etc. depending on the amount of documents to be distributed
7. Distribute specialized documents to appropriate personnel or prepare for distribution at local printers.
8. Prepare an oral report on one of the specialized documents.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

8.6 Handle an outgoing telephone call.

PERFORMANCE OBJECTIVE

P8.6 Given access to telephone or business telephone trainer, handle an outgoing telephone call according to the guidelines provided by instructor. Properly plan and place call, stating and recording messages accurately.

PERFORMANCE MEASURE

M8.6 Student demonstration/role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe types of outgoing calls that may need to be made in an office.
2. Identify the types of telephone services that are available.
3. Identify the parts of a local telephone directory.
4. Obtain a telephone number through directory assistance.
5. Describe the use of personal and company directories kept manually or electronically.
6. Define *direct-dial, operator-assisted, person-to-person, collect, conference,* and *WATS* calls.
7. Identify the five standard time zones in the U. S. and Canada.
8. Plan the call:
   - Obtain the telephone number.
   - Know the organization and/or person's name.
   - Gather information about the call.
9. Place the call:
   - Identify yourself.
   - Identify person with whom you need to speak.
   - State the purpose of the call.
   - Write down important information about the call.
10. Thank the person and terminate the call.
11. Identify guidelines for making outgoing calls and controlling telephone costs.
12. Role play placing outgoing telephone calls.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Adminis tration (6621)

TASK/COMPETENCY

8.7 Handle an incoming telephone call.

PERFORMANCE OBJECTIVE

P8.7 Given access to telephone or business telephone trainer, handle an incoming telephone call according to the guidelines provided by instructor. Demonstrate a pleasing telephone personality and proper telephone etiquette.

PERFORMANCE MEASURE

M8.7 Student demonstration/role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of handling incoming telephone calls properly.
2. Explain how voice, speech patterns, vocabulary, and attitude contribute to making a favorable first impression.
3. Identify proper telephone technqiues for handling incoming calls.
    - Answer promptly.
    - Identify yourself and company.
    - Obtain caller's identity and nature of call.
    - Process call:
        - Provide necessary information.
        - Transfer call if necessary.
        - Place caller on "hold."
        - Record message.
        - Schedule appointment if necessary.
        - Assist the caller yourself if you are able.
    - Conclude call.
4. Define common features of telephone systems: *auto redial, call block, call forwarding, caller ID, call queuing, call return, call waiting, memory,* and *speakerphone.*
5. Define *screening* and illustrate various methods used in offices.
6. Demonstrate proper techniques for taking telephone messages using preprinted forms or computer screen.
7. Role play calls with students and have them record information about calls on message forms.
8. Identify guidelines for placing callers on hold, for transferring calls, and for handling disconnected calls.
9. Identify acceptable/unacceptable use of office phones for transacting personal business.
10. Identify various types of telephone answering equipment and services.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), Office Administration (6621), Computer Applications (6611), Computer Solutions (6610), Computer Information Systems (6612), Accounting (6320), Business Law (6131), Business Management (6135), Desktop/Multimedia Presentations (6630), Keyboarding (6151), Make It Your Business (6110), Notetaking (6241)

TASK/COMPETENCY

8.8 Process messages using voice mail.

PERFORMANCE OBJECTIVE

P8.8 Given access to voice mail system and information to be received or transmitted, process messages using voice mail system according to instructor guidelines.

PERFORMANCE MEASURE

M8.8 Student demonstration/role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *voice mail.*
2. Demonstrate proper techniques for receiving messages through voice mail system:
   - Have paper and pencil to record messages.
   - Write complete information: name, company, telephone number, and important points.
   - Delete messages after recording all information.
3. Demonstrate proper techniques for transmitting messages through voice mail system:
   - Plan what to say in advance.
   - Identify yourself; giving your name, time, and date of call.
   - State the purpose of the call.
   - Leave your number, including the area code.
   - Terminate the call.
4. Establish opportunities with area businesses for students to send and receive messages.
5. Supervise students as they transmit and receive voice mail messages and provide feedback.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
8.9 Take accurate notes.

PERFORMANCE OBJECTIVE
P8.9 Given reading material or oral presentation, take accurate notes. Notes should contain all major points addressed and should be taken in accordance with instructor guidelines.

PERFORMANCE MEASURE
M8.9 Notebook check; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of taking accurate notes and the consequences when notes are inaccurate.
2. List strategies for taking notes when reading materials:
   - Scan/preview material.
   - Read actively.
   - Highlight main ideas and related ideas.
   - Reread and review material.
3. List strategies for taking notes when listening to a speaker or involved in a meeting:
   - Listen critically.
   - Note major points.
   - Recognize details.
   - Detect bias.
   - Beome aware of notetaking mechanics (adequate supplies, label notes, listen for speaker cues, flag important parts of notes, review notes promptly).
4. Provide practice exercises to reinforce elements of notetaking that incorporate both reading and listening.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
8.10 Participate in teleconference.

PERFORMANCE OBJECTIVE
P8.10 Given agenda and list of conference participants, coordinate and participate in teleconference. Conference should meet the objectives of management and coordinator.

PERFORMANCE MEASURE
M8.10 Role-play activity; acceptable score based on objectives of management and coordinator

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define t*eleconferencing, computer conference, audio teleconference, audiograhic teleconference,* and *video teleconference.*
2. Identify elements of each type of conference and the advantages and disadvantages of each.
3. Define *conference participant.*
4. Identify guidelines that maximize conference success.
5. List methods of informing conference participants of necessary data.
6. Define *conference leader.*
7. Identify guidelines that should be followed by leaders to assure success of conference.
8. Define *agenda.* Distribute sample copies of agendas and explain various formats that can be utilized.
9. Observe and/or participate in teleconference.
10. Use case studies to help set up the agenda for a conference and the procedures to follow.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Legal Systems Administration (6735), Medical Systems Administration (6730), Office Administration (6621), Computer Applications (6611), Computer Solutions (6610), and Computer Information Systems (6612)

TASK/COMPETENCY

8.11 Prepare an oral presentation for delivery.

PERFORMANCE OBJECTIVE

P8.11 Given a topic, prepare an oral presentation for delivery of at least three minutes' length according to instructor guidelines. The presentation must be coherent, logical, grammatically correct, and utilize proper techniques of public speaking.

PERFORMANCE MEASURE

M8.11 Student presentation to class; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the basic types of oral presentations and the advantages and disadvantages of each.
2. Explain the need for assessing the audience before preparing the presentation.
3. Explain the importance of a well-planned introduction.
4. Identify organizational patterns that can be adopted and/or modified to ensure logical presentation of material.
5. Explain how the conclusion should be designed to evoke desired audience reaction.
6. Assign topic(s) to students, providing research time for gathering materials, and supervise development of presentation.
7. Supervise student preparation of outlines and provide feedback.
8. Identify techniques that can be used to control "stage fright."
9. Explain proper use of verbal and nonverbal communications.
10. Identify guides for effective delivery:
    - Speak clearly.
    - Use appropriate language.
    - Be concise.
    - Consider your audience.
11. Videotape student rehearsals to use for self-assessment.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Accounting (6320), Advanced Accounting (6321), Business Law (6131), Business Management (6135), Computer Applications (6611), Computer Information Systems (6612), Desktop/Multimedia Presentations (6630), Finance (6120), Keyboarding (6151), Legal Systems Administration (6735), Make It Your Business (6110), Medical Systems Administration (6730), and Notetaking (6241)

TASK/COMPETENCY

8.12 Participate in the exchange of ideas within small and large groups.

PERFORMANCE OBJECTIVE

P8.12 Given a topic or problem to discuss and an assignment to a discussion group, participate in the exchange of ideas within small and large groups according to instructor guidelines. Discussion techniques should meet standards for effective group dynamics.

PERFORMANCE MEASURE

M8.12 Group discussion; participation rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. List differences between small and large group communication techniques.
2. Describe factors that may prevent individuals from communicating effectively within groups.
3. Identify principles to follow when interacting with others:
    - Be a team member.
    - Do not gossip.
    - Show appreciation.
    - Accept responsibility for mistakes.
    - Be a good listener.
    - Speak clearly.
4. Identify methods for taking accurate notes:
    - Listen critically.
    - Note major points.
    - Recognize details.
    - Detect bias.
    - Become aware of notetaking mechanics (adequate supplies, label notes, listen for speaker cues, flag important parts of notes, review notes promptly).
5. Define *group dynamics* and explain its importance in successful group interaction.
6. Assign topics to groups of students, observe group interactions, and provide feedback.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Accounting (6320), Advanced Accounting (6321), Business Law (6131), Business Management (6135), Computer Applications (6611), Computer Information Systems (6612), Desktop/Multimedia Presentations (6630), Finance (6120), Keyboarding (6151), Legal Systems Administration (6735), Make It Your Business (6110), Medical Systems Administration (6730), Notetaking (6241), Office Administration (6621), and Word Processing (6625)

TASK/COMPETENCY

8.13 Apply decision-making techniques to solve problems.

PERFORMANCE OBJECTIVE

P8.13 Given an office management problem or case study, apply decision-making techniques to solve problems according to insructor guidelines. The solution must contain all steps of the decision-making process (problem identification, possible solutions and assessment theory, choosing a solution and evaluation of decision).

PERFORMANCE MEASURE

M8.13 Written report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *decision making.*
2. Define *problem* and *symptom* and explain the importance of differentiating between them.
3. List the steps in problem solving and discuss important elements of each step.
    - Identify the problem.
    - Decide on possible solutions.
    - Assess the positive and negatives of each solution.
    - Determine the appropriate solution.
    - Evaluate decision.
4. Assign case studies to analyze orally with students.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSES

Business Management (6135), Computer Information Systems (6612), Finance (6120), Legal Systems Administration (6735), Make It Your Business (6110), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY

8.14 Handle customer relations.

PERFORMANCE OBJECTIVE

P8.14 Given case studies dealing with customer relations, handle customer relations according to guidelines agreed upon by management and coordinator. Included factors should be a positive attitude, appropriate personal appearance, and goodwill toward customer.

PERFORMANCE MEASURE

M8.14 Group activity/role-play situation; acceptable score based on management and coordinator guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *human relations* and explain the importance of good human relations skills.
2. Identify elements that make up a positive attitude.
3. List ways that employees can exhibit a good attitude.
4. Explain the importance of personal appearance.
5. Define *customer* and describe factors that cause customers to return to a business.
6. Identify ways to recognize customers and remember their names.
7. Describe employee's role in representing the company to others:
    - greeting customers and visitors pleasantly
    - making introductions and shaking hands
    - listening carefully
    - providing empathy and promoting goodwill
    - assisting customer and visitors with their stated and unstated needs
    - remaining loyal to company goals and policies
    - behaving in an ethical manner
8. Explain the meaning of the phrase, "The customer is always right."
9. Define *liaison* and explain guidelines for serving as a liaison for the company.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
8.15 Transcribe from recorded media.

PERFORMANCE OBJECTIVE
P8.15 Given keyboard, transcribing machine, and tape/disk containing recorded dictation, transcribe from recorded media using correct machine controls. The finished copy must meet mailability standards.

PERFORMANCE MEASURE
M8.15 Transcribed documents; acceptable score based on mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Read about transcribing recorded media and define related terms: *analog dictation, centralized dictation systems, desktop dictation/transcribing units, dictation media, digital dictation, discrete media, endless loop tapes, hard disks, index slip, multifunctional units, originator, portable dictation units, private-line (hard-wired) system, random access, remote,* and *serial access.*
2. Describe the concepts of machine transcription, using equipment demonstration or visuals from vendor catalogs.
3. Describe the advantages and disadvantages of machine transcription.
4. Identify main types of dictation equipment and describe the uses of each type.
5. Classify dictation media by its extent of handling and its form of recording sound.
6. Contrast and analye the different means used for connecting centralized systems.
7. Set up transcribing units and demonstrate operating procedures.
8. Identify guidelines for machine transcription and mailability standards.
9. Transcribe documents from recorded media using instructional tape series.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATION

COURSES
Legal Systems Administration (6735), Medical Systems Administration (6730), and Office Administration (6621)

TASK/COMPETENCY
8.16 Conduct tour of information processing operations.

PERFORMANCE OBJECTIVE
P8.16 Given a request for a tour, knowledge of information processing operations, and knowledge of organizational guidelines concerning tours, conduct tour of information processing operations that meet the specific needs of the visiting group and adhere to organizational guidelines concerning tours.

PERFORMANCE MEASURE
M8.16 Mock tour with classmates; rated acceptable according to organizational guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe how to determine the interest of tour group.
2. Describe the need to prepare itinerary.
3. Clarify the need to confirm tour plans with group leader, if available.
4. Explain the importance of informing management of the itinerary for the tour.
5. Demonstrate how to guide the group through the information processing operations on the day of the tour.
6. Explain how to answer questions asked by the tour group.
7. Describe how to conclude a tour.

DUTY AREA

1. FUNDAMENTAL OFFICE OPERATIONS

TASKS/COMPETENCIES

NO POSTSECONDARY TASKS IN THIS DUTY AREA

DUTY AREA

2. PERFORMING FINANCIAL ACTIVITIES
(Essential Postsecondary Tasks)

TASKS/COMPETENCIES

2.14 Summarize charges for billing.
2.15 Prepare vouchers for payments due.
2.16 Maintain budget.
2.17 Report charge-back costs.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Secretarial Accounting (ACC 105)
Accounting I (ACC 111)

TASK/COMPETENCY
2.14 Summarize charges for billing.

PERFORMANCE OBJECTIVE
P2.14 Given list of customers and subsidiary ledger account balances, summarize charges for billing with 100% accuracy.

PERFORMANCE MEASURE
M2.14 Accounts receivable worksheet; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the reason for billing.
2. Explain accounts receivable and list of customers.
3. Explain accounts receivable ledger and examine sales, cash, and returns transactions.
4. Demonstrate how to use ledger to identify amounts due from each customer.
5. Explain the statement of account document.
6. Explain billing dates and cycles.
7. Prepare a statement of account from the accounts receivable ledger.
8. Assign practice exercises to review all steps.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSES
Secretarial Accounting (ACC 105)
Accounting I (ACC 111)

TASK/COMPETENCY
2.15 Prepare vouchers for payments due.

PERFORMANCE OBJECTIVE
P2.15 Given blank vouchers and vendor data in accounts payable ledger or unpaid file, prepare vouchers for payments due with 100% accuracy. Vouchers must be legible and neat with accurate computations.

PERFORMANCE MEASURE
M2.15 Prepared vouchers; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *voucher* and *voucher system.*
2. Identify the characteristics of a voucher system.
3. Explain the following elements in a voucher system: *vouchers, voucher register, unpaid voucher file, check register,* and *paid voucher file.*
4. Illustrate the organization and storage of the unpaid and paid voucher file.
5. Explain the relationship between accounts payable ledger balances and preparation of vouchers.
6. Demonstrate the completion of a voucher.
7. Complete a voucher register and explain the reason for not completing the columns for date of payment and check number when recording vouchers.
8. Review addition and subtraction of money amounts to compute totals.
9. Write or print voucher checks.
10. Practice recording voucher checks in check register and recording date of payment and check number in voucher register.
11. Complete worksheets on the procedures previously demonstrated.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSE
Secretarial Accounting (ACC 105)

TASK/COMPETENCY
2.16 Maintain budget.

PERFORMANCE OBJECTIVE
P2.16 Given budget information, maintain budget according to instructor guidelines. Budget items should be organized and listed according to predetermined categories. Use a variance column to show the difference between actual and budgeted amounts. Computations should be accurate.

PERFORMANCE MEASURE
M2.16 Test; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *budget.*
2. Explain the purpose of budgets for personal and business use.
3. Explain the frequency of preparing budgets.
4. Explain the main heading for budgets which answer the questions *who, what,* and *when.*
5. Explain the relevance of the historical record of a company's receipts and expenditures in preparing budgets.
6. Explain how organizations keep a record to compare budgeted amounts with actual amounts.
7. Review an organization's budget form and completed budget and explain each element.
8. Illustrate the variance column that shows the difference between actual and budgeted amounts.
9. Explain factors that influence percentage changes in estimated income and expenditures for an organization.
10. Compute percent changes in estimated income and expenditure for next year.
11. Utilize practice exercises to review steps and format.

DUTY AREA
2. PERFORMING FINANCIAL ACTIVITIES

COURSE
Accounting II (ACC 112)

TASK/COMPETENCY
2.17 Report charge-back costs.

PERFORMANCE OBJECTIVE
P2.17 Given costs incurred by one department on another department's expense account, calculate, record, and report charge-back costs to appropriate department according to instructor checklist.

PERFORMANCE MEASURE
M2.17 Worksheet; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Define *charge-back cost.*
2. List examples of charge-back transactions.
3. Calculate costs incurred by one or more departments but recorded in another department.
4. Journalize corrected entries to record expense to department that actually incurred it, and deduct this expense from department in which it was recorded.
5. Explain purposes of determining and reporting charge-back costs.
6. Do exercises to practice correcting journal entries.

DUTY AREA

3. SUPERVISING OFFICE ACTIVITIES
(Essential Postsecondary Tasks)

TASKS/COMPETENCIES

3.7 Maintain hardware and software inventory records.
3.8 Establish information/word processing production standards.
3.9 Develop information needs required by programmers.
3.10 Resolve user problems.

DUTY AREA	COURSE
3. SUPERVISING OFFICE ACTIVITIES	Office Administration I (OFT 243)

TASK/COMPETENCY
3.7 Maintain hardware and software inventory records.

PERFORMANCE OBJECTIVE
P3.7 Given an inventory of hardware and software, maintain hardware and software inventory records to match those of the instructor. Label new inventory and fill out warranties, etc. Fill out forms for newly purchased, as well as deleted inventory. Records should agree with physical count of items on hand.

PERFORMANCE MEASURE
M3.7 Physical inventory record; totals to match those of the instructor at an acceptable rating

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *hardware* and *software inventory*.
2. Demonstrate counting hardware and software against a current inventory.
3. Demonstrate labeling newly purchased hardware and software.
4. Fill out warranty and other necessary vendor information on newly purchased hardware and software.
5. Identify the proper forms that need to be filled out to add the newly purchased hardware and software to inventory records.
6. Identify the correct procedures for disposing of hardware and software.
7. Identify information needed if hardware was given as a donation.
8. Fill out forms used when deleting hardware or software from inventory records.
9. Maintain an inventory of the hardware and software in the classroom against inventory sheets.

DUTY AREA	COURSE
3. SUPERVISING OFFICE ACTIVITIES	Office Administration I (OFT 243)

TASK/COMPETENCY
3.8 Establish information/word processing production standards.

PERFORMANCE OBJECTIVE
P3.8 Given the work logs of each employee and a company distribution work log, establish information/word processing production standards. Standards should be based upon clear and objective criteria specified by instructor, that will result in prompt turnaround of information/word processing assignments.

PERFORMANCE MEASURE
M3.8 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the need to communicate with management in order to establish information/word processing production standards.
2. Describe how to evaluate the employee's work logs so that an employee rank can be established.
3. Determine work to be done.
4. Identify priority of work.
5. Estimate time required to complete each task.
6. Match assignments with employee(s) based on their rank and the time limits that have been identified.
7. Record work on company distribution work log to be distributed to employees.
8. Revise company distribution work log to acommodate new priority work requests and employee absences.
9. Have students establish information/word processing production standards.

DUTY AREA

3. SUPERVISING OFFICE ACTIVITIES

COURSE

Introduction to Office Automation
(OFT 230)

TASK/COMPETENCY

3.9 Develop information needs required by programmers.

PERFORMANCE OBJECTIVE

P3.9 Given a topic or case studies to be evaluated and researched, access to hardware and software, and the necessary reference materials, develop information needs required by programmers in order to implement any computer program in a timely manner. Information must be developed according to instructor guidelines.

PERFORMANCE MEASURE

M3.9 Written plan; rated acceptable according to criteria provided in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify needed information from the programmer.
2. Determine a deadline for getting information.
3. Take notes to avoid asking repetitive questions.
4. Gather data/information from manuals and other employees.
5. Practice taking notes.
6. Outline material in memo or report format.
7. Explain why notes may be needed for future use.

DUTY AREA

3. SUPERVISING OFFICE ACTIVITIES

COURSE

Microcomputer Office Automation I
(OFT 231)

TASK/COMPETENCY

3.10 Resolve user problems.

PERFORMANCE OBJECTIVE

P3.10 Given a problem, resolve user problems according to instructor guidelines. Solution should enable user to resume and maintain work production within acceptable time limits.

PERFORMANCE MEASURE

M3.10 Written plan; rated acceptable according to criteria provided in instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Communicate with the user to determine the problem.
2. Ask the user to demonstrate the problem.
3. Take notes on what is said and keep printouts of anything that may help solve the problem.
4. Use manuals to solve simple problems.
5. Describe when to bring in outside help to solve the problem.
6. Use case studies to evaluate and research problems and derive solutions.
7. Follow up with the user to ensure that the problem has been solved.

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DUTY AREA

4. SUPERVISING OFFICE PERSONNEL

TASKS/COMPETENCIES

NO POSTSECONDARY TASKS IN THIS DUTY AREA

DUTY AREA

5. PREPARING AND DISTRIBUTING DOCUMENTS/INFORMATION
(Essential Postsecondary Tasks)

TASKS/COMPETENCIES

5.10 Prepare microfilm/microfiche.
5.11 Convert document from one software program to another.

DUTY AREA
5. PREPARING AND DISTRIBUTING DOCUMENTS/INFORMATION

COURSE
Microcomputer Office Automation II (OFT 232)

TASK/COMPETENCY
5.10 Prepare microfilm/microfiche.

PERFORMANCE OBJECTIVE
P5.10 Given access to microfilm/microfiche equipment, tape equipment, COM equipment, and the file to be copied, prepare microfilm/microfiche so that it is an exact copy of the file from tape.

PERFORMANCE MEASURE
M5.10 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Verify that the file to be copied is correct.
2. Turn on the microfilm/microfiche equipment.
3. Transfer the file to magnetic tape.
4. Transfer tape to COM machine.
5. Issue commands to record file that is on tape to microfilm/microfiche equipment.
6. Explain the importance of careful editing to ensure that the microfilm/microfiche is an exact copy of file from tape.
7. Distribute the microfilm/microfiche to the appropriate personnel.
8. Exit the equipment properly.

DUTY AREA
5. PREPARING AND DISTRIBUTING DOCUMENTS/INFORMATION

COURSE
Microcomputer Office Automation II (OFT 232)

TASK/COMPETENCY
5.11 Convert document from one software program to another.

PERFORMANCE OBJECTIVE
P5.11 Given access to a computer, software for the conversion, and document to be converted, convert document from one software program to another. The document should be in mailable form.

PERFORMANCE MEASURE
M5.11 Student demonstration; acceptable score based on mailability standards

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the reason for converting documents between software programs.
2. Enter the software where the conversion will be completed.
3. Refer to software manuals for specific information on conversions of documents.
4. Follow the software's steps for conversion.
5. Print the converted document.
6. Save the converted document.
7. Exit the software programs.

DUTY AREA

6. MAINTAINING COMPUTER FILE

TASKS/COMPETENCIES

NO POSTSECONDARY TASKS IN THIS DUTY AREA

DUTY AREA

7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS
(Essential Postsecondary Tasks)

TASKS/COMPETENCIES

7.4 Participate in business and/or social functions.
7.5 Coordinate business and/or social functions.
7.6 Provide backup coverage for absent co-workers.
7.7 Obtain passport.
7.8 Plan a physical layout of the office.
7.9 Coordinate civic activities.

DUTY AREA
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS

COURSE
Office Administration I (OFT 243)

TASK/COMPETENCY
7.4 Participate in business and/or social functions.

PERFORMANCE OBJECTIVE
P7.4 Given an organized function, participate in business and/or social functions according to instructor guidelines. Function should be conducted to satisfy objectives of the plan.

PERFORMANCE MEASURE
M7.4 Written report; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of arriving early at the function to attend to last-minute activities.
2. Check plan and implement assigned duties.
3. Identify methods of ensuring that all aspects of the function are being implemented according to plan.
4. List traits of friendliness, a winning personality, and dressing attractively through discussion with presenters, participants, and helpers.
5. Review elements introduced through discussions and worksheets.

DUTY AREA
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS

COURSE
Office Administration I (OFT 243)

TASK/COMPETENCY
7.5 Coordinate business and/or social functions.

PERFORMANCE OBJECTIVE
P7.5 Given relevant information, coordinate business and/or social function to meet the objectives of management and coordinator.

PERFORMANCE MEASURE
M7.5 Outline for plan; acceptable score based on objectives of management and coordinator

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Open and prepare a file to store all information related to the function.
2. Know the approximate number of participants expected to attend the function and the amount of money available.
3. Develop a plan to identify and coordinate activities.
4. Reserve adequate space for specific date(s).
5. Contact organizers regarding time(s) that meeting or social will be in session.
6. Explain the reasons for meeting with organizers to prepare program.
7. List methods of presenters.
8. Identify the appropriate time and method of contacting food service providers for luncheons, dinners, parties, and/or breaks.
9. Identify equipment and supplies that will be required.
10. Identify the appropriate time to send announcements to participants.
11. Identify the advantages and disadvantages of purchasing tokens for each presenter.
12. Implement reminder systems for organizing activities.
13. Confirm dates and details with space and food service providers, as well as presenters.
14. Prepare a financial report to show cash available and itemized expenses supported by documents.
15. Confirm registration plans.
16. Review concepts through worksheets and case problems.

DUTY AREA	**COURSE**
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS	Office Administration II (OFT 244)

TASK/COMPETENCY

7.6 Provide backup coverage for absent co-workers.

PERFORMANCE OBJECTIVE

P7.6 Given information about absent co-workers, provide backup coverage for absent co-workers through internal or external sources, in accordance with instructor guidelines.

PERFORMANCE MEASURE

M7.6 Backup plan; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Provide a system for identifying absent workers by a specific time each day and having vacation and sick schedules available.
2. Examine job descriptions and the tasks to be performed during the absence of each employee.
3. Identify internal and external sources for providing qualified backup workers.
4. Identify advantage and disadvantage of using internal sources such as supervisors of "floaters" or other available workers.
5. Identify the appriopriate time to contact external source such as temporary employment agencies.
6. Identify methods of matching vacant positions with available backup workers.
7. Identify methods of assigning jobs to workers with required skills.
8. Explain the reasons for informing supervisors about assigned backup workers.
9. Explain the importance of maintaining records of job assignments.
10. Review concepts and procedures through discussions, worksheets, and case studies.

DUTY AREA	**COURSE**
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS	Office Administration I (OFT 243)

TASK/COMPETENCY

7.7 Obtain passport.

PERFORMANCE OBJECTIVE

P7.7 Given international travel plans, obtain passport by completing application forms. Passport should be obtained according to instructor guidelines.

PERFORMANCE MEASURE

M7.7 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Describe international travel with reference to a passport and a visa.
2. Define *passport* and *visa*.
3. Identify countries that do or do not require passports and visas from American citizens.
4. Outline steps in obtaining a passport and visa.
5. Examine application forms used in obtaining passports.
6. Complete practice application forms following instructions.
7. Attach appropriate documents to completed application forms and submit to passport office.
8. Complete checklist to review concepts and procedures.

DUTY AREA **COURSE**
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS Office Administration I (OFT 243)

TASK/COMPETENCY
7.8 Plan a physical layout of the office.

PERFORMANCE OBJECTIVE
P7.8 Given information regarding office space, job functions and responsibilities, furniture and equipment, volume of records, and number of employees, plan a physical layout of the office according to instructor guidelines. Layout should allow for a smooth and efficient flow of business operations.

PERFORMANCE MEASURE
M7.8 Plan of office layout; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *work flow.*
2. Identify work flow in the office.
3. Prepare work flow chart to show movement of forms, etc.
4. Identify the advantages and disadvantages of the current flow of work.
5. Explain the importance of making movement between individuals and work stations more efficient.
6. Identify effect of office equipment and furniture on the physical layout.
7. Examine office layout plans and use the work flow chart to develop a plan to reduce duplication of movement.
8. Prepare before and after office layout plans and/or reports to indicate the benefits of the new plan.
9. Identify standard space requirements and psychological needs of employees that affect physical layout of the office.

DUTY AREA **COURSE**
7. PERFORMING ADMINISTRATIVE SUPPORT OPERATIONS Office Administration I (OFT 243)

TASK/COMPETENCY
7.9 Coordinate civic activities.

PERFORMANCE OBJECTIVE
P7.9 Given relevant information such as date, time, participants, and goals, coordinate civic activities by finding a location, planning the food and program. These should meet the stated objectives and should follow instructor guidelines.

PERFORMANCE MEASURE
M7.9 Written plan; acceptable score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Gather all information regarding the civic activity.
2. Identify major and minor tasks to be completed.
3. Describe use of these tasks, dates, and time periods to develop a plan of action.
4. Contact key persons to meet in organizing the activity.
5. Meet with key persons to identify deadlines and assignments.
6. Contact persons who will assist in the physical arrangements, food preparation, presentations, etc.
7. List methods of informing potential participants of activity.
8. Contact key persons to confirm their participation and/or contribution.
9. List last-minute matters to be dealt with.
10. Attend the activity personally.
11. Attend to follow-up activities like thank you notes.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATIONS
(Essential Postsecondary Tasks)

TASKS/COMPETENCIES

8.17 Develop a report.
8.18 Develop surveys to conduct.
8.19 Interpret software documentation.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATIONS

COURSE
Keyboarding/Typewriting (OFT 112)

TASK/COMPETENCY
8.17 Develop a report.

PERFORMANCE OBJECTIVE
P8.17 Given a topic to be researched, access to reference materials, and the necessary equipment and supplies, develop a report according to instructor guidelines. All sources of information should be properly recorded.

PERFORMANCE MEASURE
M8.17 Written report; score based on instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the need for reports.
2. List common characteristics of reports.
3. Describe difference between formal and informal reports.
4. Identify the process for writing a report.
5. Identify methods for collecting data.
6. Describe the writing process for the final stage of developing a report, including the final outline/draft, arrangement, and graphic elements.
7. Identify the preliminary parts of the report including the cover; title page; letter of transmittal; table of contents; list of tables, graphs, charts, or illustrations; and abstract.
8. Describe the parts of the body of the report including introduction, text, and terminal section of summary, conclusion, and recommendations.
9. Describe the supplementary parts of the report including the appendix, bibliography, and index.
10. Describe the printing, binding, and distribution processes for reports.
11. Assist students in their completion of assigned reports.

DUTY AREA
8. PERFORMING OFFICE COMMUNICATIONS

COURSE
Introduction to Office Automation (OFT 230), Office Administration I (OFT 243)

TASK/COMPETENCY
8.18 Develop surveys to conduct.

PERFORMANCE OBJECTIVE
P8.18 Given topics and guidelines, develop surveys to conduct that will provide the required data. Mail, phone, or personal surveys may be used, asking questions clearly, simply, and objectively with a goal of easy evaluation of answers. Results should be computed in summary format in accordance with instructor guidelines.

PERFORMANCE MEASURE
M8.18 Survey developed; evaluated according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define *survey* and describe its usefulness in gathering data.
2. Explain mail, telephone, and personal surveys and the advantages and disadvantages of each method.
3. Identify general problems associated with survey data collection and identify solutions.
4. Describe methods for getting people to respond to the survey.
5. Identify guidelines for designing a survey:
    - Ask only the necessary questions that will provide the information needed.
    - Use established methods to facilitate interviewee's response.
    - Phrase questions clearly.
    - Design questions whose answers will be easy to evaluate.
    - Phrase questions objectively.
    - Avoid personal questions not related to the survey.
6. Examine a variety of surveys and critique them according to the discussed guidelines.
7. Develop a classroom survey.
8. Complete results in summary format.

DUTY AREA

8. PERFORMING OFFICE COMMUNICATION

COURSE

Introduction to Office
Automation (OFT 230);
Office Administration I (OFT 243)

TASK/COMPETENCY

8.19 Interpret software documentation.

PERFORMANCE OBJECTIVE

P8.19 Given resource pages from software manual and test questions related to resource material, interpret software documentation. Answers must be correct according to the resource material given.

PERFORMANCE MEASURE

M8.19 Test; a minimum of 80% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Examine a variety of software manuals.
2. Describe the sections contained within a manual.
3. Assign worksheet pages containing practice questions to enable students to locate answers from software manual pages.
4. Identify solutions to critical-thinking activities where multiple alternatives may be chosen.
5. Have students complete case studies on interpreting software documentation.

PROGRAM DESIGN

Secondary Course Offerings

Postsecondary Course Requirements

COURSE OFFERINGS

Office Systems and Related Offerings
(Secondary Level)

Legal Systems Administration (6735)

Medical Systems Administration (6730)

Office Administration (6621)

Keyboarding (6151)

Computer Information Systems (6612)

Desktop Publishing/Multimedia Presentations (6630)

Notetaking (6241)

Advanced Computer Information Systems (6613)

Principles of Business and Marketing (6115)

Accounting (6320)

Advanced Accounting (6321)

Finance (6120)

Computer Applications (6611)

Computer Solutions (6610)

Word Processing (6625)

Office Administration I (OFT 243)

Office Administration II (OFT 244)

Business Law (6131)

Make It Your Business (6110)

Business Management (6135)

COURSE REQUIREMENTS

Office Systems
(Postsecondary Level)

ACCOUNTING 105	Secretarial Accounting
ACCOUNTING 111	Accounting I
ACCOUNTING 112	Accounting II
OFFICE SYSTEMS TECHNOLOGY 243	Office Administration I
OFFICE SYSTEMS TECHNOLOGY 244	Office Administration II
OFFICE SYSTEMS TECHNOLOGY 230	Introduction to Office Automation
OFFICE SYSTEMS TECHNOLOGY 231	Microcomputer Office Automation I
OFFICE SYSTEMS TECHNOLOGY 232	Microcomputer Office Automation II
OFFICE SYSTEMS TECHNOLOGY 112	Keyboarding/Typewriting

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RETAIL MARKETING

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Virginia Beach Public Schools

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OCCUPATIONAL ANALYSIS

Occupational Task List, Retail Marketing

A. PERFORMING BUYING, INVENTORYING, RECEIVING, AND STOCKING FUNCTIONS
Recommend merchandise to be stocked.
Approve inventories of merchandise.
Approve orders for merchandise.
Verify/approve receiving invoices.
Approve storage of merchandise.
Prepare merchandise transfer documents.
Approve transfer of stock from one department/branch to another.
Implement inventory control program.
Price incoming merchandise.
Implement approved price changes on merchandise.
Check merchandise for correct and legible price markings.
Check quality of merchandise.
Submit report on damaged or otherwise unsalable merchandise.
Implement returns to vendor.
Pack and wrap merchandise for return to vendor.
Check sales floor for proper stocking.
Conduct merchandise inventories.
Place order for new merchandise.
Order replacement merchandise.
Special order merchandise.
Plan product space allocation.
Process inventory control records.
Receive shipments of merchandise.
Set up merchandise receiving schedules.
Unpack incoming merchandise.
Stock merchandise on sales floor.
Store merchandise.
Rotate stock.

B. PERFORMING CUSTOMER SERVICE FUNCTIONS
Approve civic activities on premises.
Demonstrate merchandise.
Process cash/credit/lay-away sales transactions.
Process customer special orders.
Process mail and telephone orders.
Package/gift-wrap customer's purchases.
Approve merchandise exchanges and refunds according to store policy.
Process merchandise exchanges and refunds.
Handle customer complaints.
Handle customer injuries, accidents, and emergency illnesses.
Handle customer inquiries.
Set up and maintain a customer file.
Telephone customers.
Issue rain checks.
Monitor customer service.
Explain guarantees/warranties to customers.
Sell gift certificates.

Performing Customer Service Functions (continued)

- Process rental transactions.
- Dispatch service trunk on customer order.

C. SELLING

- Approach the customer.
- Determine customer needs.
- Present merchandise.
- Overcome objections.
- Close the sale.
- Suggest additional or related merchandise.
- Reinforce the customer's buying decision.

D. PERFORMING SALES PROMOTION ACTIVITIES

- Approve advertising copy.
- Approve orders for display materials.
- Set up displays (counter/manufacture/window).
- Carry out promotional program.
- Tidy up displays.
- Dismantle displays.
- Order display materials.
- Plan displays and display time schedule.
- Plan promotional activities inside and outside store.
- Post advertisements.
- Coordinate promotional signage.
- Implement sales contests.

E. PERFORMING EMPLOYEE MANAGEMENT AND EMPLOYEE ADMINISTRATIVE FUNCTIONS

- Advise employees of changes in store policies and procedures.
- Approve employees' work assignments.
- Prepare/approve employees' work schedule.
- Approve vacation schedules.
- Assign tasks to employees.
- Set and monitor employee goals.
- Conduct exit interviews.
- Conduct meetings for store personnel.
- Control policies concerning employees's purchases.
- Distribute information concerning federal laws and regulations.
- Distribute information concerning products, sales, promotions, price changes, and changes in merchandise stocked.
- Evaluate employees' work.
- Handle employee accidents and emergency illnesses.
- Handle employee complaints.
- Write job descriptions, specifications, etc.
- Interview job applicants.
- Monitor dress code.
- Orient new employees to store policies and procedures.
- Develop /implement a sales training program.
- Train employees.
- Oversee wage, salary, and fringe benefit program.
- Develop/implement incentive programs (contests, spiffs, etc.).
- Promote positive morale through employee recognition, good working environment, manager role model, etc.
- Write articles for company newsletter.

F. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

Approve employees' time cards.
Prepare/approve invoices for payment.
Prepare coupons for redemption.
Approve prepared coupon redemption requests.
Prepare/approve prepared daily sales/cash report.
Prepare computer data forms.
Prepare forms for obtaining credit for damaged or shorted merchandise.
Prepare/approve prepared payrolls.
Collect monies from vending machines.
Control check-cashing policies and procedures.
Control customer credit policies and procedures.
Control petty cash fund.
File store records.
Issue operational forms to cashier-checkers such as: voids, over-rings, rain checks, and checks cashed.
Make bank deposits.
Make comparison shopping trips.
Maintain an insurance program.
Maintain an up-to-date mailing list.
Follow store policy on bad checks.
Prepare bank deposits.
Prepare budgets.
Prepare cash drawers.
Prepare insurance claim forms.
Process cashier-checker change and currency requests.
Process incoming mail.
Receive cash deliveries from bank or banking service.
Ring up merchandise sales on cash register.
Close cut cash register.
Prepare bank draft for change and currency.
Process courtesy card applications.
Process credit card applications.

G. PERFORMING HOUSEKEEPING AND MAINTENANCE FUNCTIONS

Approve purchases of supplies.
Order/purchase supplies.
Inventory equipment.
Approve equipment inventory.
Inventory supplies.
Approve inventory of supplies.
Order equipment.
Store equipment and supplies.
Arrange for building repairs.
Arrange for the repair of malfunctioning equipment.
Clean up merchandise on sales floor.
Clean counters and shelves.
Clean fitting rooms.
Straighten merchandise on racks and shelves.
Conduct a preventive maintenance program for equipment.
Conduct a program to reduce energy consumption.
Conduct a sanitation program to meet health regulations concerning the handling and storage of merchandise.

Performing Housekeeping and Maintenance Functions (continued)

Conduct an exterior housekeeping program.
Conduct an interior housekeeping program, including associate areas.
Clean floors/mirrors/windows.
Handle linen supplies and cleaning services.

H. PERFORMING SAFETY FUNCTIONS

Carry out a fire safety program.
Carry out a general safety program.
Carry out a store security program.
Close the check-out area.
Close the store.
Handle customer fraudulence.
Handle employee pilferage.
Handle shoplifters according to company policy.
Observe for and report/correct hazardous conditions.
Open store.
Secure the store money.

CAREER PATHS		
High School Diploma	**Applied Associate Degree**	**Baccalaureate Degree**
Retail Sales Associate	Departmental Manager	Manufacturer's Sales Representative
Visual Merchandise Asst.	Sales Manager	Visual Merchandiser
Retail Sales Consultant	Assistant Buyer	Fashion Consultant
Buyer's Clerical	Manager Trainee	Store Manager
Customer Service Representative	Assistant Manager	Merchandise Manager

RELATED ACADEMIC COMPETENCIES

DUTY AREA 1. PERFORMING BUYING, INVENTORYING, RECEIVING, AND STOCKING FUNCTIONS

1.1 Make written list of merchandise to be stocked.
1.2 Perform merchandise intake.
1.3 Prepare merchandise transfer documents.
1.4 Implement approved price changes on merchandise.
1.5 Check merchandise for correct and legible price markings.
1.6 Prepare merchandise for return to vendor.
1.7 Submit a report on damaged or incorrect merchandise.
1.8 Conduct merchandise inventories.
1.9 Stock merchandise.

LANGUAGE ARTS COMPETENCIES*	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Read with comprehension.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	1.8
• Demonstrate critical thinking skills.	1.1, 1.2, 1.3, 1.5, 1.6,1.7, 1.8, 1.9
• Read and interpret technical information.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.8, 1.9
• Demonstrate a sense of responsibility for participating in discussion.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Take notes from written, oral, and audiovisual material.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	1.8
• Verify numeric/data entries.	1.1, 1.2, 1.3, 1.4, 1.5, 1.7, 1.8, 1.9
• Give clear oral and written responses.	1.1, 1.2, 1.3, 1.4, 1.5, 1.7, 1.8
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	1.8, 1.9
• Follow multistep oral and written instructions.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Communicate ideas, concepts, and feelings.	1.8
• Complete forms with accuracy.	1.1, 1.2, 1.3, 1.4, 1.6, 1.7, 1.8
• Ask questions necessary to gain assistance and information.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Use general and technical references.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8
• Demonstrate proficiency in nonverbal communication.	1.2, 1.3, 1.4, 1.6, 1.8, 1.9
• Participate in a cooperative learning situation.	
MATH COMPETENCIES*	
• Add/subtract whole numbers.	1.1, 1.2, 1.3, 1.4, 1.7, 1.8
• Multiply/divide whole numbers.	1.1, 1.2, 1.3, 1.4, 1.7, 1.8
• Average numbers.	1.1, 1.4, 1.5, 1.8
• Compare numbers.	1.1, 1.2, 1.3, 1.4, 1.5, 1.7, 1.8

MATH COMPETENCIES	TECHNICAL COMPETENCY
• Read/write decimals.	1.1, 1.2, 1.3, 1.4, 1.7, 1.8
• Add/subtract decimals.	1.1, 1.2, 1.3, 1.4, 1.7, 1.8
• Multiply/divide decimals.	1.1, 1.2, 1.3, 1.4, 1.7, 1.8
• Round decimals.	1.1, 1.2, 1.3, 1.4, 1.7, 1.8
• Use percents.	1.1,1.3, 1.4,1.8
• Add/subtract fractions.	1.1, 1.4, 1.8
• Multiply/divide fractions.	1.1, 1.4, 1.8
• Reduce fractions to lowest terms.	1.4
• Add/subtract mixed numbers.	1.1, 1.4, 1.8
• Reduce mixed numbers.	1.1, 1.4, 1.8
• Multiply/divide mixed numbers.	1.1, 1.4, 1.8
• Interpret/make graphs, charts, forms.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9
• Sequence numbers.	1.1, 1.2, 1.3, 1.5, 1.7, 1.8, 1.9
• Perform measurements.	1.6, 1.9
• Find ratio and proportion.	1.4, 1.8
• Use formulas.	1.1, 1.4, 1.8
• Compute unit prices.	1.4, 1.8
• Calculate with integers and rationals.	
• Use calculators.	1.1, 1.3, 1.4, 1.7, 1.8
• Use estimation.	1.6, 1.9
• Determine order of operations.	1.4, 1.8
• Problem solve.	1.1, 1.2, 1.3, 1.4, 1.5, 1.6,1.7, 1.8, 1.9

*Based on locally derived occupational information

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.1 Make written list of merchandise to be stocked.

PERFORMANCE OBJECTIVE
P1.1 Given a simulated inventory and instructions, make written list of merchandise to be stocked. List must be made according to instructor guidelines.

PERFORMANCE MEASURE
M1.1 Student-generated worksheet; all items rated acceptable according to instructor rating sheet

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of stocking merchandise.
2. Explain concept of basic stock lists.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.2 Perform merchandise intake.

PERFORMANCE OBJECTIVE
P1.2 Given receiving records and merchandise, perform merchandise intake in accordance with instructor checklist.

PERFORMANCE MEASURE
M1.2 Merchandise checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain and demonstrate ways to unpack incoming merchandise.
2. Demonstrate the procedures for checking in merchandise using various forms.
3. Explain the importance of the receiving function.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.3 Prepare merchandise transfer documents.

PERFORMANCE OBJECTIVE
P1.3 Given merchandise, store policy, and the necessary forms, prepare merchandise transfer documents to be used between departments and/or stores, with 100% accuracy.

PERFORMANCE MEASURE
M1.3 Sample merchandise transfer form; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of accurately transferring merchandise.
2. Participate in simulations involving the transfer of merchandise.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.4 Implement approved price changes on merchandise.

PERFORMANCE OBJECTIVE
P1.4 Given store policy, sample merchandise, and price-marking techniques, implement approved price changes on merchandise according to instructor guidelines, with 100% accuracy. Use percentage and ratio/proportion formulas to calculate markdowns.

PERFORMANCE MEASURE
M1.4 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe the importance of accurately pricing merchandise.
2. Participate in simulations involving the repricing of merchandise.
3. Calculate markdowns using percentage and ratio/proportion formulas.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.5 Check merchandise for correct and legible price markings.

PERFORMANCE OBJECTIVE
P1.5 Given merchandise and inventory sheets, check merchandise for correct and legible price markings with 100% accuracy.

PERFORMANCE MEASURE
M1.5 Instructor-prepared inventory sheet ; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Review inventory sheets.
2. Explain the importance of correct and legible price markings.
3. Determine the information to be included on a price ticket.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.6 Prepare merchandise for return to vendor.

PERFORMANCE OBJECTIVE
P1.6 Given merchandise and instructions, prepare merchandise for return to vendor. To be considered are types of packing materials and various packing procedures. Preparation must be made according to instructor checklist.

PERFORMANCE MEASURE
M1.6 Student demonstration; all items rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Check guidelines for packing and wrapping.
2. Identify various types of packing materials.
3. Identify the packing procedures used by various transportation companies.
4. Observe an instructor demonstration on packing and wrapping merchandise.
5. Complete the return form (UPS, RPS, etc.).

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.7 Submit a report on damaged or incorrect merchandise.

PERFORMANCE OBJECTIVE
P1.7 Given merchandise and forms, submit a report on damaged or incorrect merchandise. Report must be submitted according to instructor guidelines.

PERFORMANCE MEASURE
M1.7 Written report, rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Outline procedures for completing reports on damaged or incorrect merchandise.
2. Create sample reports on damaged or incorrect merchandise.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
1.8 Conduct merchandise inventories.

PERFORMANCE OBJECTIVE
P1.8 Given the necessary instrument(s) and written guidelines for taking a physical inventory, conduct merchandise inventories with 100% accuracy according to instructor checklist.

PERFORMANCE MEASURE
M1.8 Written inventory report; rated 100% accurate based on instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe basic marketing math calculations.
2. Explain the importance of inventory control.
3. Differentiate between perpetual and physical inventory.
4. Prepare a report that compares and contrasts two different stores.

DUTY AREA

1. PERFORMING BUYING, INVENTORYING RECEIVING, AND STOCKING FUNCTIONS

COURSE

Retail Marketing
Secondary

TASK/COMPETENCY

1.9 Stock merchandise.

PERFORMANCE OBJECTIVE

P1.9 Given information, sample merchandise, and an explanation of procedures for proper stock care, stock merchandise in accordance with instructor guidelines.

PERFORMANCE MEASURE

M1.9 Student demonstration; rated acceptable according to instructor rating sheet.

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain basic stock housekeeping duties.
2. Define stock terms such as: *fronting, blocking, reshopping, sizing, zoning*, and *rotating.*
3. Demonstrate stocking merchandise in a school store.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 2. PERFORMING CUSTOMER SERVICE FUNCTIONS

2.1 Process various sales transactions.
2.2 Package customers' purchases.
2.3 Complete merchandise exchanges and refunds according to store policy.
2.4 Handle customer inquiries and complaints.
2.5 Establish a preferred-customer file.
2.6 Handle cutomer injuries, accidents, and emergency illnesses.

LANGUAGE ARTS COMPETENCIES*	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6
• Read with comprehension.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	2.3, 2.4, 2.5, 2.6
• Demonstrate critical thinking skills.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6
• Read and interpret technical information.	2.1, 2.2, 2.3, 2.4, 2.6
• Demonstrate a sense of responsibility for participating in discussion.	2.2, 2.3, 2.4, 2.5, 2.6
• Take notes from written, oral, and audiovisual material.	2.2, 2.3, 2.4, 2.5, 2.6
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	2.4, 2.6
• Verify numeric/data entries.	2.1, 2.3, 2.5
• Give clear oral and written responses.	2.1, 2.3, 2.4, 2.5, 2.6
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	2.3, 2.4, 2.6
• Follow multistep oral and written instructions.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6
• Communicate ideas, concepts, and feelings.	2.3, 2.4, 2.6
• Complete forms with accuracy.	2.1, 2.3, 2.5, 2.6
• Ask questions necessary to gain assistance and information.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6
• Use general and technical references.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6
• Demonstrate proficiency in nonverbal communication.	2.2, 2.3, 2.4
• Participate in a cooperative learning situation.	2.4, 2.6
MATH COMPETENCIES*	
• Add/subtract whole numbers.	2.1, 2.3
• Multiply/divide whole numbers.	2.1, 2.3
• Average numbers.	2.1, 2.3
• Compare numbers.	2.1, 2.3
• Read/write decimals.	2.1, 2.3
• Add/subtract decimals.	2.1, 2.3
• Multiply/divide decimals.	2.1, 2.3
• Round decimals.	2.1, 2.3
• Use percents.	2.1, 2.3
• Add/subtract fractions.	2.1, 2.3
• Multiply/divide fractions.	2.1, 2.3
• Reduce fractions to lowest terms.	2.1, 2.3
• Add/subtract mixed numbers.	2.1, 2.3
• Reduce mixed numbers.	2.1, 2.3
• Multiply/divide mixed numbers.	2.1, 2.3
• Interpret/make graphs, charts, forms.	2.1, 2.3, 2.5, 2.6

• Sequence numbers.	2.1, 2.3, 2.6
• Perform measurements.	2.1, 2.2
• Find ratio and proportion.	2.3
• Use formulas.	2.1, 2.3
• Compute unit prices.	2.1, 2.3
• Calculate with integers and rationals.	2.1, 2.3
• Use calculators.	2.1, 2.3
• Use estimation.	2.3
• Determine order of operations.	2.1, 2.3
• Problem solve.	2.1, 2.2, 2.3, 2.4, 2.5, 2.6

*Based on locally derived occupational information

DUTY AREA
1. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
2.1 Process various sales transactions

PERFORMANCE OBJECTIVE
P2.1 Given information on types of sales transactions (cash, credit and lay-away, etc.), process various sales transactions using corresponding forms with 100% accuracy according to instructor guidelines.

PERFORMANCE MEASURE
M2.1 Student demonstration; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the various types of sales transactions.
2. Complete the form involved in handling the following sales transactions: cash, credit, lay-away, telephone, mail-order, special order, and rental.
3. Identify the steps involved in handling a gift certificate sale.

DUTY AREA
2.2 PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
2.2 Package customers' purchases.

PERFORMANCE OBJECTIVE
P2.2 Given materials, samples, and guidelines, package customers' purchases using different methods of gift wrapping according to instructor checklist.

PERFORMANCE MEASURE
M2.2 Student demonstration; all items must be judged above average on instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the value of well-packaged merchandise.
2. Outline guidelines for packing and gift wrapping.
3. Observe a teacher demonstration on packing and gift wrapping merchandise.
4. Perform different methods of gift wrapping.

DUTY AREA
2. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
2.3 Complete merchandise exchanges and refunds according to store policy.

PERFORMANCE OBJECTIVE
P2.3 Given instructions, case studies, and forms, complete merchandise exchanges and refunds according to store policy with 100% accuracy.

PERFORMANCE MEASURE
M2.3 Exchange and refund forms; 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the reasons for merchandise refunds and exchanges.
2. Define different types of merchandise exchanges.
3. Display basic marketing math calculations for refunds and exchanges.

DUTY AREA
2. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
2.4 Handle customer inquiries and complaints.

PERFORMANCE OBJECTIVE
P2.4 Given instructor-prepared case studies and sample store policies, handle customer inquiries and complaints according to instructor guidelines.

PERFORMANCE MEASURE
M2.4 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of satisfying the customer.
2. Identify common customer complaints.
3. Define the term *customer inquiry*.
4. Describe the steps involved in handling customer inquiries about merchandise and store policies.
5. Develop case studies of customer complaints.

DUTY AREA
2. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
2.5 Establish a preferred-customer file.

PERFORMANCE OBJECTIVE
P2.5 Given instruction and materials, establish a preferred-customer file, making use of the telephone book and city directories when necessary. File must be established according to instructor guidelines.

PERFORMANCE MEASURE
M2.5 Student-produced customer file; prepared in accordance with instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of maintaining a preferred-customer list.
2. Describe the steps involved in setting up a preferred-customer file.
3. Demonstrate the proper manner for telephoning preferred customers.
4. Demonstrate use of telephone book and city directories.

DUTY AREA
2. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
2.6 Handle customer injuries, accidents, and emergency illnesses.

PERFORMANCE OBJECTIVE
P2.6 Given case studies and role-play activities, handle customer injuries, accidents, and emergency illnesses in accordance with instructor checklist.

PERFORMANCE MEASURE
M2.6 Role-play activities; judged acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of promptly handling customer injuries, accidents, and emergency illnesses.
2. Identify the common causes of customer injuries and accidents.
3. List the steps involved in handling customer injuries, accidents, and emergency illnesses.
4. Handle situations in case studies involving customer injuries.
5. Process accident forms.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 3. SELLING

3.1 Identify the steps of a sale.
3.2 Approach the customer.
3.3 Determine customer needs.
3.4 Demonstrate the merchandise.
3.5 Overcome objections in a sales situation.
3.6 Close the sale.
3.7 Suggest additional or related merchandise.
3.8 Reinforce the customers' buying decisions.

LANGUAGE ARTS COMPETENCIES*	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Read with comprehension.	3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Demonstrate critical thinking skills.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Read and interpret technical information.	3.4, 3.5, 3.7
• Demonstrate a sense of responsibility for participating in discussion.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Take notes from written, oral, and audiovisual material.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	3.2, 3.4, 3.5, 3.8
• Verify numeric/data entries.	3.7
• Give clear oral and written responses.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	3.2, 3.3, 3.4, 3.5, 3.7, 3.8
• Follow multistep oral and written instructions.	3.1, 3.2, 3.4, 3.5, 3.6, 3.7
• Communicate ideas, concepts, and feelings.	3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Complete forms with accuracy.	3.7
• Ask questions necessary to gain assistance and information.	3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Use general and technical references.	3.2, 3.2, 3.3, 3.4, 3.5, 3.7, 3.8
• Demonstrate proficiency in nonverbal communication.	3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
• Participate in a cooperative learning situation.	3.3, 3.4, 3.5
MATH COMPETENCIES*	
• Add/subtract whole numbers.	3.7
• Multiply/divide whole numbers.	3.7
• Average numbers.	
• Compare numbers.	3.1, 3.7

MATH COMPETENCIES	TECHNICAL COMPETENCY
• Read/write decimals.	3.7
• Add/subtract decimals.	3.7
• Multiply/divide decimals.	3.7
• Round decimals.	3.7
• Use percents.	3.7
• Add/subtract fractions.	
• Multiply/divide fractions.	
• Reduce fractions to lowest terms.	
• Add/subtract mixed numbers.	
• Reduce mixed numbers.	
• Multiply/divide mixed numbers.	
• Interpret/make graphs, charts, forms.	3.7
• Sequence numbers.	
• Perform measurements.	3.4
• Find ratio and proportion.	3.1, 3.7
• Use formulas.	3.7
• Compute unit prices.	3.7
• Calculate with integers and rationals.	3.7
• Use calculators.	3.7
• Use estimation.	
• Determine order of operations.	
• Problem solve.	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8

*Based on locally derived occupational information

DUTY AREA
3. SELLING

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
3. Identify the steps of a sale.

PERFORMANCE OBJECTIVE
P3.1 Given instruction and guidelines, identify the steps of a sale in accordance with instructor checklist.

PERFORMANCE MEASURE
M3.1 Written test; average or above average rating

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of selling.
2. Describe the process of helping a customer make a purchasing decision.
3. Identify the steps of a sale after viewing a sales presentation video.

DUTY AREA
3. SELLING

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
3. Approach the customer.

PERFORMANCE OBJECTIVE
P3.2 Given instructions on methods and role-play activities, approach the customer with an understanding of the impact of each method of approach. Customer should be approached in accordance with instructor checklist.

PERFORMANCE MEASURE
M3.2 Role-play demonstration; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the methods of the various approaches.
2. Explain the impact of each method of approach.
3. Write a paper analyzing the advantages and disadvantages of the various methods of approaches.

DUTY AREA
3. SELLING

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
3. Detemine customer needs.

PERFORMANCE OBJECTIVE
P3.3 Given instruction and role-play activities, determine customer needs according to instructor guidelines. Differentiate between a need and a want.

PERFORMANCE MEASURE
M3.3 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify common customer needs.
2. Differentiate between a need and a want.
3. Explain why determining needs and wants are essential to the sales process.
4. Participate in small-group demonstrations depicting customer wants, using peer evaluation.

DUTY AREA
3. SELLING

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
3.4 Demonstrate the merchandise.

PERFORMANCE OBJECTIVE
P3.4 Given instruction, product information sheets, and role-play activities, demonstrate the merchandise to be sold in accordance with instructor checklist.

PERFORMANCE MEASURE
M3.4 Student demonstration; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Write a feature/benefit analysis.
2. Explain the importance of product knowledge.
3. Identify the problems that can arise when demonstrating a product or performing a service.
4. Perform product demonstrations in small groups using peer evaluation.

DUTY AREA
3. SELLING

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
3.5 Overcome objections in a sales situation.

PERFORMANCE OBJECTIVE
P3.5 Given a list of common objections, present oral responses which overcome objections in a sales situation in accordance with instructor guidelines. Differentiate between an objection and an excuse.

PERFORMANCE MEASURE
M3.5 Student demonstration; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain an objection.
2. Differentiate between an objection and an excuse.
3. Explain why objections should be welcomed in the sales process.
4. Perform product demonstrations in small groups, using peer evaluation.
5. Write responses to customer objections and present for class discussion. Include techniques such as the "yes, but" technique, turning the objection into a question, and obtaining agreement on minor points.

DUTY AREA
3. SELLING

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
3.6 Close the sale.

PERFORMANCE OBJECTIVE
P3.6 Given different sales situations and various closing techniques, close the sale according to an instructor checklist.

PERFORMANCE MEASURE
M3.6 Student demonstration; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain when to close a sale.
2. Identify customer closing signals.
3. Explain the importance of closing a sale.
4. Explain the strategy of trial closing.
5. Identify the reasons for unsuccessful closings.
6. Perform product demonstrations in small groups, using peer evaluation.

DUTY AREA	**COURSE**
3. SELLING	Retail Marketing Secondary

TASK/COMPETENCY

3.7 Suggest additional or related merchandise.

PERFORMANCE OBJECTIVE

P3.7 Given different sales situations, suggest additional or related merchandise to purchase according to instructor guidelines.

PERFORMANCE MEASURE

M3.7 Role-play activity; student participation evaluated as acceptable on instructor rating form

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of suggestion selling.
2. Explain trading up.
3. Explain the importance of warranties and guarantees.
4. Interpret warranties and guarantees.
5. Demonstrate suggestion-selling techniques.
6. Calculate profit increases due to suggestion selling.
7. Complete sample warranty/service contract forms.

DUTY AREA	**COURSE**
3. SELLING	Retail Marketing Secondary

TASK/COMPETENCY

3.8 Reinforce the customers' buying decisions.

PERFORMANCE OBJECTIVE

P3.8 Given various sales situations, reinforce the customers' buying decisions. Consider post-purchase doubt and methods to reinforce customers' long-term satisfaction with purchases. Reinforcing customer decisions should be done according to instructor guidelines.

PERFORMANCE MEASURE

M3.8 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of reinforcing the customers' buying decisions.
2. Explain post-purchase doubt; i.e., reasons for customers' mixed emotions after purchase.
3. Describe methods to reinforce customers' long-term satisfactions with purchases.
4. Role play, making follow-up phone calls to customers.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 4. PROMOTING PRODUCTS AND SERVICES

4.1 Identify the elements of promotion.
4.2 Construct a display.

LANGUAGE ARTS COMPETENCIES*	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	4.1, 4.2
• Read with comprehension.	4.1, 4.2
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	4.1, 4.2
• Demonstrate critical thinking skills.	4.1, 4.2
• Read and interpret technical information.	4.1, 4.2
• Demonstrate a sense of responsibility for participating in discussion.	4.2
• Take notes from written, oral, and audiovisual material.	4.1, 4.2
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	4.1, 4.2
• Verify numeric/data entries.	
• Give clear oral and written responses.	4.1, 4.2
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	4.1, 4.2
• Follow multistep oral and written instructions.	4.2
• Communicate ideas, concepts, and feelings.	4.1, 4.2
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	4.1, 4.2
• Use general and technical references.	4.1, 4.2
• Demonstrate proficiency in nonverbal communication.	4.1, 4.2
• Participate in a cooperative learning situation.	4.2

MATH COMPETENCIES*
- Add/subtract whole numbers.
- Multiply/divide whole numbers.
- Average numbers.
- Compare numbers.
- Read/write decimals.
- Add/subtract decimals.
- Multiply/divide decimals.
- Round decimals.
- Use percents.
- Add/subtract fractions.
- Multiply/divide fractions.
- Reduce fractions to lowest terms.
- Add/subtract mixed numbers.
- Reduce mixed numbers.

MATH COMPETENCIES	TECHNICAL COMPETENCY
• Multiply/divide mixed numbers.	
• Interpret/make graphs, charts, forms.	
• Sequence numbers.	
• Perform measurements.	4.2
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate with integers and rationals.	
• Use calculators.	
• Use estimation.	4.2
• Determine order of operations.	
• Problem solve.	4.2

*Based on locally derived occupational information

DUTY AREA
4. PROMOTING PRODUCTS AND SERVICES

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
4.1 Identify the elements of promotion.

PERFORMANCE OBJECTIVE
P4.1 Given an overview of sales promotion, identify the elements of promotion by naming and describing the blend of strategies to promote products and services. Elements must include advertising, visual merchandising, special events, free publicity, public relations, personal selling, and sales stimulators. Identification must be made according to instructor guidelines.

PERFORMANCE MEASURE
M4.1 Student-generated written report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify different types of advertising, such as print, radio, TV, and Internet and other electronic media.
2. Differentiate between techniques for window and interior displays.
3. Give examples of local special events used to promote sales, such as parades or fashion shows.
4. Compare publicity and public relations.
5. Define *sale stimulators* such as free samples, coupons, rebates, and special sales.
6. Explain the relationship of personal selling to other elements of promotion.

DUTY AREA
4. PROMOTING PRODUCTS AND SERVICES

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
4.2 Construct a display.

PERFORMANCE OBJECTIVE
P4.2 Given directions, props and merchandise, construct a display according to instructor checklist.

PERFORMANCE MEASURE
M4.2 Small-group produced displays; all items rated acceptable based on an instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of visual merchandising to a retailer.
2. Describe the choice of merchandise, props, and settings available for displays.
3. Define commonly used diplay terms.
4. Summarize in writing the proper procedures for maintaining and dismantling displays.
5. Analyze the effectiveness of a display.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 5. PERFORMING EMPLOYEE MANAGEMENT AND EMPLOYEE ADMINISTRATIVE FUNCTIONS

5.1 Train employees.
5.2 Identify the basic housekeeping tasks performed in a retail store.

LANGUAGE ARTS COMPETENCIES	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	5.1, 5.2
• Read with comprehension.	5.1
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	5.1, 5.2
• Demonstrate critical thinking skills.	5.1, 5.2
• Read and interpret technical information.	5.1
• Demonstrate a sense of responsibility for participating in discussion.	5.1, 5.2
• Take notes from written, oral, and audiovisual material.	5.1, 5.2
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	5.1, 5.2
• Verify numeric/data entries.	5.2
• Give clear oral and written responses.	5.1, 5.2
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	5.1, 5.2
• Follow multistep oral and written instructions.	5.1, 5.2
• Communicate ideas, concepts, and feelings.	5.1, 5.2
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	5.1, 5.2
• Use general and technical references.	5.1, 5.2
• Demonstrate proficiency in nonverbal communication.	5.1, 5.2
• Participate in a cooperative learning situation.	5.1, 5.2

MATH COMPETENCIES	
• Add/subtract whole numbers.	
• Multiply/divide whole numbers.	
• Average numbers.	
• Compare numbers.	
• Read/write decimals.	
• Add/subtract decimals.	
• Multiply/divide decimals.	
• Round decimals.	
• Use percents.	
• Add/subtract fractions.	
• Multiply/divide fractions.	
• Reduce fractions to lowest terms.	
• Add/subtract mixed numbers.	
• Reduce mixed numbers.	
• Multiply/divide mixed numbers.	
• Interpret/make graphs, charts, forms.	5.2
• Sequence numbers.	

MATH COMPETENCIES	TECHNICAL COMPETENCY
• Perform measurements.	
• Find ratio and proportion.	
• Use formulas.	
• Compute unit prices.	
• Calculate with integers and rationals.	
• Use calculators.	
• Use estimation.	5.2
• Determine order of operations.	
• Problem solve.	5.1, 5.2

DUTY AREA
5. PERFORMING EMPLOYEE MANAGEMENT AND ADMINSTRATIVE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
5.1 Train employees.

PERFORMANCE OBJECTIVE
P5.1 Given new employee training manuals, train employees, using clear communication skills, in entry-level tasks. Training must be performed according to instructor guidelines.

PERFORMANCE MEASURE
M5.1 Role-play activity; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of properly trained employees.
2. Explain in writing the importance of clear communication when training employees.
3. Observe teacher during employee training.
4. Examine sample training manuals.
5. Write a training manual for a new employee.

DUTY AREA
5. PERFORMING EMPLOYEE MANAGEMENT AND ADMINSTRATIVE FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
5.2 Identify basic housekeeping tasks performed in a retail store.

PERFORMANCE OBJECTIVE
P5.2 Given instruction, identify basic housekeeping tasks performed in a retail store. Tasks must include maintaining and ordering supplies and equipment, as well as organizing and cleaning various areas and items. Identification of tasks must be made in accordance with instructor guidelines.

PERFORMANCE MEASURE
M5.2 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of maintaining and ordering supplies and equipment necessary for basic housekeeping chores in keeping with store image.
2. Cite examples of organizing and cleaning the following: display cases, countertops, sales register areas, sales floor areas, fitting rooms, stock/store rooms, and trash bins.
3. Clean floors, windows, and mirrors.
4. Identify appropirate times for housekeeping chores.
5. In small groups, develop a questionnaire to be used to interview several local businesses regarding their housekeeping procedures.
6. Create a written report with charts and graphs based on interviews with several local businesses.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 6. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

6.1 Prepare the cash drawer.
6.2 Ring transactions on the cash register.
6.3 Close out the cash register.
6.4 Reject counterfeit money, bad checks, bad credit cards, and short-change from con-artists.

LANGUAGE ARTS COMPETENCIES	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	6.1, 6.2, 6.3, 6.4
• Read with comprehension.	6.1, 6.2, 6.3, 6.4
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	6.1, 6.2, 6.3, 6.4
• Demonstrate critical thinking skills.	6.1, 6.2, 6.3, 6.4
• Read and interpret technical information.	6.2, 6.3, 6.4
• Demonstrate a sense of responsibility for participating in discussion.	6.1, 6.2, 6.3, 6.4
• Take notes from written, oral, and audiovisual material.	6.1, 6.2, 6.3, 6.4
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	6.4
• Verify numeric/data entries.	6.1, 6.2, 6.3, 6.4
• Give clear oral and written responses.	6.1, 6.2, 6.3, 6.4
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	6.1, 6.3, 6.4
• Follow multistep oral and written instructions.	6.1, 6.2, 6.3, 6.4
• Communicate ideas, concepts, and feelings.	6.1, 6.2, 6.3, 6.4
• Complete forms with accuracy.	6.1, 6.3
• Ask questions necessary to gain assistance and information.	6.1, 6.2, 6.3, 6.4
• Use general and technical references.	6.1, 6.2, 6.3, 6.4
• Demonstrate proficiency in nonverbal communication.	6.1, 6.2, 6.3, 6.4
• Participate in a cooperative learning situation.	6.1, 6.3, 6.4

MATH COMPETENCIES	
• Add/subtract whole numbers.	6.1, 6.2, 6.3, 6.4
• Multiply/divide whole numbers.	6.1, 6.2, 6.3
• Average numbers.	6.2, 6.3
• Compare numbers.	6.1, 6.2, 6.3
• Read/write decimals.	6.1, 6.2, 6.3
• Add/subtract decimals.	6.1, 6.2, 6.3
• Multiply/divide decimals.	6.1, 6.2, 6.3
• Round decimals.	6.1, 6.2, 6.3
• Use percents.	6.2
• Add/subtract fractions.	6.2
• Multiply/divide fractions.	6.2
• Reduce fractions to lowest terms.	6.2
• Add/subtract mixed numbers.	6.2
• Reduce mixed numbers.	6.2
• Multiply/divide mixed numbers.	6.2
• Interpret/make graphs, charts, forms.	6.1, 6.2, 6.3
• Sequence numbers.	6.1, 6.2, 6.3

MATH COMPETENCIES	TECHNICAL COMPETENCY
• Perform measurements.	6.2
• Find ratio and proportion.	
• Use formulas.	6.2, 6.3
• Compute unit prices.	6.2
• Calculate with integers and rationals.	6.1, 6.2, 6.3, 6.4
• Use calculators.	6.1, 6.2, 6.3
• Use estimation.	
• Determine order of operations.	6.2, 6.3
• Problem solve.	6.1, 6.2, 6.3, 6.4

DUTY AREA

6. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

COURSE

Retail Marketing
Secondary

TASK/COMPETENCY

6.1 Prepare the cash drawer.

PERFORMANCE OBJECTIVE

P6.1 Given instructions and a cash register till, prepare the cash drawer by arranging currency and coins. Verify an open change fund and *buy change*. Drawer should be prepared according to instructor checklist.

PERFORMANCE MEASURE

M6.1 Student demonstration; rated 100% accurate based on an instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the importance of properly preparing a cash drawer.
2. Describe the arrangement of currency and coins in a cash drawer.
3. Identify the steps in verifying an opening change fund and complete the proper form.
4. Explain how to check for adequate change.
5. Define *buying change.*
6. Role play setting up a cash drawer with partner evaluation.

DUTY AREA

6. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

COURSE

Retail Marketing
Secondary

TASK/COMPETENCY

6.2 Ring transactions on the cash register.

PERFORMANCE OBJECTIVE

P6.2 Given instructions and worksheets, ring transactions on the cash register with 100% accuracy, safeguarding money, handling coupons, credit cards, and using basic math functions.

PERFORMANCE MEASURE

M6.2 Student demonstration; rated 100% accurate based on an instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. List the activities that make up a sales transaction.
2. Differentiate between manual and computer-assisted sales transactions.
3. List common errors made in a sales transaction.
4. Explain the importance of safeguarding money at the cash register.
5. Demonstrate the procedures followed when making change in a cash sale.
6. Demonstrate the procedures for handling coupons for redemption.
7. Demonstrate the procedure used for handling credit card purchases.
8. Calculate basic math functions used on a cash register; i.e., discounts, C.O.D.s, layaways, returns, exchanges, etc.

DUTY AREA	**COURSE**
6. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS	Retail Marketing Secondary

TASK/COMPETENCY

6.3 Close out the cash register.

PERFORMANCE OBJECTIVE

P6.3 Given instructions and worksheets, close out the cash register with 100% accuracy. Complete a daily balance form, leave an opening change fund for the next shift, and complete a deposit transaction.

PERFORMANCE MEASURE

M6.3 Role-play activity; rated 100% accurate based on instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. List the steps involved in closing the cash drawer.
2. Complete a daily balance form.
3. Define terms associated with balancing the cash register.
4. Work in pairs to demonstrate leaving an opening change fund for the next shift.
5. Complete deposit transaction.

DUTY AREA	**COURSE**
6. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS	Retail Marketing Secondary

TASK/COMPETENCY

6.4 Reject counterfeit money, bad checks, bad credit cards, and short-change from con-artists.

PERFORMANCE OBJECTIVE

P6.4 Given instructions and worksheets, reject counterfeit money, bad checks, bad credit cards and short-change from con-artists according to instructor checklist.

PERFORMANCE MEASURE

M6.4 Role-play activity; rated acceptable based on instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the procedures involved in differentiating between genuine and counterfeit money, bad checks, and bad credit cards.
2. Observe a role-play involving a short-change artist.
3. Write a paper on the consequences of passing bad checks, counterfeit money, etc.

RELATED ACADEMIC COMPETENCIES

DUTY AREA 7. PERFORMING SAFETY FUNCTIONS

7.1 Implement a general safety program.
7.2 Identify the most effective methods to deter shoplifting and employee pilferage.

LANGUAGE ARTS COMPETENCIES	TECHNICAL COMPETENCY
• Demonstrate listening comprehension skills.	7.1, 7.2
•Read with comprehension.	7.1, 7.2
• Demonstrate proficiency in speaking, appropriate for speaker's purpose and audience.	7.1, 7.2
• Demonstrate critical thinking skills.	7.1, 7.2
• Read and interpret technical information.	7.1, 7.2
• Demonstrate a sense of responsibility for participating in discussion.	7.1, 7.2
• Take notes from written, oral, and audiovisual material.	7.1, 7.2
• Write, revise, edit, proofread, and document papers appropriate for the writer's purpose and audience.	7.1, 7.2
• Verify numeric/data entries.	7.2
• Give clear oral and written responses.	7.1, 7.2
• Use the dictionary and textbook glossary to obtain information about spelling, meaning, and pronunciation of words.	7.2
• Follow multistep oral and written instructions.	7.1, 7.2
• Communicate ideas, concepts, and feelings.	7.1, 7.2
• Complete forms with accuracy.	
• Ask questions necessary to gain assistance and information.	7.1, 7.2
• Use general and technical references.	7.1, 7.2
• Demonstrate proficiency in nonverbal communication.	7.2
• Participate in a cooperative learning situation.	7.1

MATH COMPETENCIES	
• Add/subtract whole numbers.	7.2
• Multiply/divide whole numbers.	7.2
• Average numbers.	7.2
• Compare numbers.	7.2
• Read/write decimals.	7.2
• Add/subtract decimals.	7.2
• Multiply/divide decimals.	7.2
• Round decimals.	7.2
• Use percents.	7.2
• Add/subtract fractions.	
• Multiply/divide fractions.	
• Reduce fractions to lowest terms.	
• Multiply/divide fractions.	
• Reduce fractions to lowest terms.	
• Add/subtract mixed numbers.	

MATH COMPETENCIES	TECHNICAL COMPETENCY
• Reduce mixed numbers.	
• Multiply/divide mixed numbers.	
• Interpret/make graphs, charts, forms.	7.2
• Sequence numbers.	
• Perform measurements.	
• Find ratio and proportion.	7.2
• Use formulas.	7.2
• Compute unit prices.	
• Calculate with integers and rationals.	7.2
• Use calculators.	7.2
• Use estimation.	7.2
• Determine order of operations.	
• Problem solve.	7.1, 7.2

DUTY AREA
7. PERFORMING SAFETY FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
7.1 Implement a general safety program.

PERFORMANCE OBJECTIVE
P7.1 Given instructions, case studies, and city codes regarding general safety regulations, implement a general safety program according to instructor guidelines. Consider input from local fire department, OSHA, and the custodial staff.

PERFORMANCE MEASURE
M7.1 Written report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Participate in a forum with experts from the local fire department, OSHA, and the custodial staff.
2. Explain the need to observe and report hazardous conditions that may result in injury to employees and/or customers; i.e., spills, horse-play, operating equipment without authorization, removal of safety equipment, expired fire extinguishers, etc.
3. Interview the school's custodial staff regarding the general safety program used at school.

DUTY AREA
7. PERFORMING SAFETY FUNCTIONS

COURSE
Retail Marketing
Secondary

TASK/COMPETENCY
7.2 Identify the most effective methods to deter shoplifting and employee pilferage.

PERFORMANCE OBJECTIVE
P7.2 Given instruction and video presentations, identify the most effective methods to deter shoplifting and employee pilferage according to instructor checklist.

PERFORMANCE MEASURE
M7.2 Instructor checklist; all items rated acceptable

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of loss prevention.
2. Differentiate among the various types of shoplifters.
3. List ways crime affects everyone.
4. Outline the Virginia Code regarding shoplifting.
5. Describe armed robbery.
6. Identify ways to prevent shoplifting.
7. Invite guest speakers from the business community to talk with class about shoplifting and employee pilferage.
8. Differentiate between shoplifting and employee pilferage.
9. Assess the cost of shoplifting and employee pilferage.

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RETAIL MARKETING
Postsecondary

DUTY AREAS

1. PERFORMING BUYING, INVENTORYING, RECEIVING AND STOCKING FUNCTIONS
2. PERFORMING CUSTOMER SERVICE FUNCTIONS
3. PROMOTING AND SELLING PRODUCTS AND SERVICES
4. PERFORMING EMPLOYEE MANAGEMENT AND ADMINISTRATIVE FUNCTIONS
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS
6. PERFORMING HOUSEKEEPING AND MAINTENANCE FUNCTIONS
7. PERFORMING SAFETY FUNCTIONS

DUTY AREA
1. PERFORMING BUYING, INVENTORYING, RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
1.1 Order appropriate merchandise assortments.

PERFORMANCE OBJECTIVE
P1.1 Given acquisition resources, recommend, approve, and order appropriate merchandise assortments by generating a basic stock list, identifying market sources, terms, invoices, scheduling, and ordering new-to-the-store merchandise in accordance with instructor guidelines.

PERFORMANCE MEASURE
M1.1 Written buying plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Generate a basic stock list.
2. Identify sources of market information.
3. Generate a six-month merchandise buying plan.
4. Describe the procedure for buying merchandise in the market.
5. Define merchandise acquisition terms.
6. Complete a merchandise order.
7. Verify accuracy of receiving invoices for correct pricing and terms.
8. Establish merchandise receiving schedules.
9. Describe the criteria for ordering new merchandise not previously carried by the retail sore.

DUTY AREA
1. PERFORMING BUYING, INVENTORYING, RECEIVING, AND STOCKING FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
1.2 Establish a merchandise storage inventory plan.

PERFORMANCE OBJECTIVE
P1.2 Given a store floor plan, establish a merchandise storage inventory plan according to instructor checklist.

PERFORMANCE MEASURE
M1.2 Written inventory storage plan; rated acceptable based on an instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Prepare forward and reserve stock plan.
2. Identify security measures for storage of merchandise.
3. Describe the problems of different kinds of merchandise.
4. Compare and contrast owning versus leasing warehouse facilities.

DUTY AREA
2. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
2.1 Establish cash, credit, and layaway sales transaction policies.

PERFORMANCE OBJECTIVE
P2.1 Given a store mission statement, establish cash, credit, and layaway sales transaction policies according to instructor checklist.

PERFORMANCE MEASURE
M2.1 Written store-policy statement; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the importance of matching customer service policies with the store's mission statement.
2. Describe procedures used in processing rain checks, mail and telehone orders, gift certificates, and customer special orders.
3. Process and approve merchandise exchanges and refunds according to store sales transaction policies.

DUTY AREA
2. PERFORMING CUSTOMER SERVICE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
2.2 Implement customer service actions (treatment, assistance, and service of customers).

PERFORMANCE OBJECTIVE
P2.2 Given a store mission statement and case studies, establish and implement customer service actions (treatment, assistance, and service of customers), according to instructor checklist.

PERFORMANCE MEASURE
M2.2 Role-play activity; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Role play handling customer complaints.
2. Describe procedures for handling emergencies involving customer injuries, accidents, and illnesses.
3. Process customer inquiries both in-store and via the telephone.
4. Implement a customer service reward program for store employees.
5. Describe the process of dispatching service trucks for customer orders.

DUTY AREA
3. PROMOTING AND SELLING PRODUCTS AND SERVICES

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
3.1 Establish promotional programs for various types of retail stores.

PERFORMANCE OBJECTIVE
P3.1 Given instructions and information about a store's image and involvement within a community, establish promotional programs for various types of retail stores according to instructor checklist.

PERFORMANCE MEASURE
M3.1 Portfolio of promotional activities; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the role of promotion in retailing.
2. Identify various types of promotional activities in retailing.
3. Identify the importance of a store's retail image and involvement within the community.
4. Identify ways to measure the success of a store's promotional activities.
5. Identify sources available to assist with the creation of unique promotional events.

DUTY AREA
3. PROMOTING AND SELLING PRODUCTS AND SERVICES

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
3.2 Establish advertising programs for various types of retail stores.

PERFORMANCE OBJECTIVE
P3.2 Given instructions, establish advertising programs for various types of retail stores, with consideration for budgets. Programs must be established according to instructor guidelines.

PERFORMANCE MEASURE
M3.2 Portfolio of advertising activities; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify the objectives of advertising.
2. Define terms associated with advertising (*institutional, promotional* and *cooperative advertising,* and *parts of an advertisement*).
3. Describe various methods to determine advertising budgets.
4. Calculate advertising expenditures based on the various media.
5. Explain how advertising results can be measured.
6. Identify the advantages and disadvantages of the different types of advertising media for retail stores.
7. Develop an advertisement for a retail store.
8. Explain the importance of keeping employees aware of current advertisements by posting ads and coordinating promotional signs.

DUTY AREA
3. PROMOTING AND SELLING PRODUCTS AND SERVICES

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
3.3 Establish a visual merchandising program to complement a retail store's image.

PERFORMANCE OBJECTIVE
P3.3 Given instructions, establish a visual merchandising program to complement a retail store's image. Factors to consider are the various kinds of displays, the choice of merchandise, fixtures, and settings available for displays. Visual must be established according to instructor guidelines.

PERFORMANCE MEASURE
M3.3 Student-produced plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Define visual merchandising and distinguish it from display.
2. Describe the various kinds of displays.
3. Describe the choice of merchandise, fixtures, and settings available for displays.
4. Identify the various design principles and their proper utilization.
5. Identify costs associated with display fixtures and access available resources.
6. Plan display and time schedules according to the promotional plan.

DUTY AREA
3. PROMOTING AND SELLING PRODUCTS AND SERVICES

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
3.4 Implement a sales training program for all store employees.

PERFORMANCE OBJECTIVE
P3.4 Given a store mission statement, establish and implement a sales training program for all store employees which addresses the importance of continuous training, as well as methods to motivate, evaluate, and compensate salespeople. Program must be implemented according to instructor guidelines.

PERFORMANCE MEASURE
M3.4 Sales training program; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. List the major topics addressed in a sales training program.
2. List the steps of a sale.
3. Evaluate the different ways to conduct a sales training program (i.e., classroom vs. on -the-job training).
4. Explain the importance of continuous training.
5. Identify the methods to motivate salespeople.
6. Identify methods to evaluate the performance of sales associates.
7. Explain various ways to compensate salespeople.

DUTY AREA	**COURSE**
4. PERFORMING EMPLOYEE MANAGEMENT AND ADMINISTRATIVE FUNCTIONS	Retail Marketing Postsecondary

TASK/COMPETENCY

4.1 Establish procedures for employee selection and placement in retail stores.

PERFORMANCE OBJECTIVE

P4.1 Given instructions and a model store, establish procedures for employee selection and placement in retail stores according to instructor guidelines.

PERFORMANCE MEASURE

M4.1 Written report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Write job descriptions and specifications for staffing a retail store.
2. Evaluate completed applications and select potential employees for interview.
3. Simulate job interviews for selection of potential employees.
4. Develop an organization chart for a model store.
5. Evaluate the various criteria used (tests, checking references, interviews, etc.) for selecting qualitifed employees.
6. Generate a list of various sources for recruiting potential employees.
7. Identify the factors involved in assigning particular employees to specific work tasks.

DUTY AREA	**COURSE**
4. PERFORMING EMPLOYEE MANAGEMENT AND ADMINISTRATIVE FUNCTIONS	Retail Marketing Postsecondary

TASK/COMPETENCY

4.2 Establish procedures for employee orientation and training for retail stores.

PERFORMANCE OBJECTIVE

P4.2 Given instructions, a model store, information on federal and state regulations, handbook, and dress code, establish procedures for employee orientation and training for retail stores according to instructor guidelines.

PERFORMANCE MEASURE

M4.2 Student-generated manual; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify the major topics that should be included in an orientation program (company history, mission, policies, etc.).
2. Develop a sales training program.
3. Simulate training of employees.
4. Establish and monitor a dress code.
5. Develop an employee handbook.
6. Identify different methods for distributing information on federal and state regulations affecting retail establishments.
7. Establish a program of continuous training to update employees on products, sales, promotions, price changes, and merchandise assortments.
8. Identify methods for advising employees of changes in store policies and procedures.

DUTY AREA
4. PERFORMING EMPLOYEE MANAGEMENT AND ADMINISTRATIVE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
4.3 Establish procedures for evaluating employee performance.

PERFORMANCE OBJECTIVE
P4.3 Given instructions and a model store, establish procedures for evaluating employee performance in accordance with instructor guidelines. This should include formal and informal, written and oral evaluations.

PERFORMANCE MEASURE
M4.3 Written report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Identify criteria that should be used to evaluate employee performance (sales volume, number of customer complaints, attendance record, etc.).
2. Schedule counseling sessions on conducting effective performance appraisals.
3. Compare and contrast formal and informal evaluations.
4. Simulate an evaluation review (written and oral) of a hypothetical employee.
5. Identify methods of assisting employees in establishing and achieving employment goals.
6. Identify methods of conducting exit interviews.

DUTY AREA
4. PERFORMING EMPLOYEE MANAGEMENT AND ADMINISTRATIVE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
4.4 Identify miscellaneous employee administrative functions.

PERFORMANCE OBJECTIVE
P4.4 Given instruction and case studies, identify miscellaneous employee administrative functions such as methods for handling complaints, illness, meetings, schedules, payments, and methods for promoting incentive and positive morale. Identification must be made according to instructor guidelines.

PERFORMANCE MEASURE
M4.4 Written evaluation of case studies; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe methods for handling employee complaints.
2. Explain procedures for handling employee accidents and emergency illnesses.
3. Establish policies for controlling employees' purchases.
4. Establish the importance of conducting regularly scheduled store meetings.
5. Create a model employee work schedule to accommodate breaks, vacations, holidays, and special promotional events.
6. Establish a competitive wage, salary, and fringe benefit program.
7. Develop and implement an employee incentive program (contests, spiffs, etc.).
8. Establish methods to promote positive employee morale.
9. Write sample articles for company newsletter.

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DUTY AREA	**COURSE**
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS	Retail Marketing Postsecondary

TASK/COMPETENCY

5.1 Establish an employee compensation package.

PERFORMANCE OBJECTIVE

P5.1 Given instructions and a model store, establish an employee compensation package to include benefit options and insurance information. Package should be established according to instructor checklist.

PERFORMANCE MEASURE

M5.1 Employee compensation package; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Evaluate different methods of compensating retail employees.
2. List employee benefit options.
3. Identify the major federal and state laws affecting employee compensation.
4. Explain the factors to consider when approving an employee's time card.
5. Outline a procedure for preparing and/or approving a company payroll.
6. Complete sample forms relating to employee tax identification.
7. Explain options available for employee insurance programs.
8. Prepare insurance claims forms.

DUTY AREA	**COURSE**
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS	Retail Marketing Postsecondary

TASK/COMPETENCY

5.2 Process invoices for payment.

PERFORMANCE OBJECTIVE

P5.2 Given instructions and sample invoices, process invoices for payment with 100% accuracy in accordance with instructor guidelines.

PERFORMANCE MEASURE

M5.2 Sample invoices; completed with 100% accuracy

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Explain the different discount terms that relate to typical retail invoices.
2. Explain the flow of a vendor's invoice from point of receipt to payment.
3. Explain the importance of verifying all invoice charges.
4. Calculate sample invoices.

DUTY AREA
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

COURSE
Retail Markting
Postsecondary

TASK/COMPETENCY
5.3 Establish cash-handling procedures.

PERFORMANCE OBJECTIVE
P5.3 Given instructions and a mock store, establish cash-handling procedures which include a daily balance form, a petty cash fund, and deposit forms according to instructor checklist.

PERFORMANCE MEASURE
M5.3 Written plan; rated acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Complete a daily balance form.
2. Establish store policy for accepting checks for payment of merchandise.
3. Establish guidelines for handling operational functions such as : voids, rain checks, checks, over-rings, etc.
4. Describe the procedures for establishing and maintaining a petty cash fund.
5. Establish procedures for processing miscellaneous income (vending machines, sale of shopping bags, and boxes).
6. Complete a sample deposit form for a retail store.
7. Prepare sample cash drawers.
8. Establish safe procedures for accepting cash deliveries from banking services.
9. Establish procedures for handling fraudulent sales transactions such as: bad checks, counterfeit money, and short-change from con-artists.

DUTY AREA
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
5.4 Establish credit card policies and procedures.

PERFORMANCE OBJECTIVE
P5.4 Given instructions and simulation handouts, establish credit card policies and procedures according to instructor guidelines

PERFORMANCE MEASURE
M5.4 Written plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the advantages and disadvantages of establishing an in-store credit plan.
2. Survey the various charges and fees associated with the different national credit card companies.
3. Explain criteria for accepting credit card applications.
4. Describe methods for handling credit card fraud and other problems such as exceeding the credit limit of a card.

DUTY AREA
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
5.5 Establish a financial plan for a retail store.

PERFORMANCE OBJECTIVE
P5.5 Given instructions, a simulated store, and various types of business budgets, establish a financial plan for a retail store in accordance with instructor guidelines.

PERFORMANCE MEASURE
M5.5 Written plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe the various dimensions of budgeting and where they are the most applicable.
2. Describe the different types of business budgets (sales budget, merchandising budget, advertising budget, cash budget, capital budget, and income statement budget).
3. Complete sample budgets.
4. Explain the benefits of preparing budgets for retail stores.

DUTY AREA
5. PERFORMING FINANCIAL AND ADMINISTRATIVE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
5.6 Establish policies for handling miscellaneous functions.

PERFORMANCE OBJECTIVE
P5.6 Given instructions and simulation handouts, establish policies for handling miscellaneous functions such as handling coupons and mail, and maintaining filing systems. Policies must be established according to instructor guidelines.

PERFORMANCE MEASURE
M5.6 Written plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Describe procedures used in preparing coupons for redemption.
2. Complete the necessary forms used in coupon redemption.
3. Explain various forms of computer application used in retail settings.
4. Identify sources for computer software to facilitate retail operations (prepared forms for entry data).
5. Describe management information systems applicable to retail store operations.
6. Process incoming mail and disseminate information to employees.
7. Describe the procedures for setting up and maintaining a filing system.

DUTY AREA
6. PERFORMING HOUSEKEEPING AND MAINTENANCE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
6.1 Establish an interior and exterior housekeeping program.

PERFORMANCE OBJECTIVE
P6.1 Given instructions and a model store, establish an interior and exterior housekeeping program which includes ordering linen supplies, selecting cleaning services, and knowing health regulations. Program must be established according to instructor checklist.

PERFORMANCE MEASURE
M6.1 Written plan; rated acceptable according to an instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Identify factors involved in ordering linen supplies and selecting cleaning services.
2. Review health regulations concerning the handling and storing of merchandise.
3. Identify the factors involved in conducting an exterior housekeeping program (such as upkeep of parking lot, lighting, signs, etc.).
4. Identify the factors involved in conducting an interior housekeeping program (such as displays, work areas, walkways, etc.).
5. Describe the benefits of maintaining an effective housekeeping program, to the total store image.

DUTY AREA
6. PERFORMING HOUSEKEEPING AND MAINTENANCE FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
6.2 Establish a program to purchase supplies and equipment.

PERFORMANCE OBJECTIVE
P6.2 Given instructions and a model store, establish a program to purchase supplies and equipment according to instructor checklist.

PERFORMANCE MEASURE
M6.2 Written plan; rated acceptable according to an instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES

1. Generate an inventory requirement list for equipment and supplies necessary to open and maintain a retail store.
2. Identify the various resources available for ordering and purchasing supplies and equipment.
3. Explain the need to approve, store, and conduct an inventory of supplies and equipment for basic maintenance levels.
4. Describe the importance of preventive maintenance and its relationship to store image.
5. Establish a program to reduce energy consumption.
6. Devise a plan for repairs of building and of malfunctioning equipment.

DUTY AREA
7. PERFORMING SAFETY FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
7.1 Implement a general safety program for a retail store.

PERFORMANCE OBJECTIVE
P7.1 Given instructions, and city, state, and federal codes regarding general safety regulations, establish and implement a general safety program for a retail store in accordance with instructor guidelines.

PERFORMANCE MEASURE
M8.1 Written plan; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Compile a list of safety regulations according to city, state, and federal codes.
2. Identify major safety hazards in a retail setting.
3. Establish policies for handling emergencies in a retail store (fire, customer accidents, robberies, etc.).

DUTY AREA
7. PERFORMING SAFETY FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
7.2 Implement a store security program.

PERFORMANCE OBJECTIVE
P7.2 Given instructions and video presentations, establish and implement a store security program in accordance with instructor guidelines which includes a loss prevention plan.

PERFORMANCE MEASURE
M8.2 Written report; rated acceptable according to instructor guidelines

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Explain the importance of loss prevention and its relationship to store pricing and profitability.
2. Differentiate among shoplifting, employee pilferage, and human error as they contribute to store shrinkage.
3. Explain the Virginia Code regarding shoplifting and employee pilferage as it relates to various retail establishments.
4. Establish a loss prevention program for a retail store to include the handling of customer fraud.

DUTY AREA
7. PERFORMING SAFETY FUNCTIONS

COURSE
Retail Marketing
Postsecondary

TASK/COMPETENCY
7.3 Establish procedures to open and secure the store.

PERFORMANCE OBJECTIVE
P7.3 Given instructions, establish procedures to open and secure the store in accordance with instructor checklist. A policy for securing store money should be established.

PERFORMANCE MEASURE
M7.3 Written plan; judged acceptable according to instructor checklist

ENABLING OBJECTIVES/LEARNING ACTIVITIES
1. Compare and contrast various retail operations and methods of securing a store.
2. Establish procedures for opening and securing the store (quantity of employees, schedule, etc.).
3. Establish policy for securing the store money and transactions/vouchers (gift certificates, lottery tickets, credit cards, etc.).

PROGRAM DESIGN

Secondary Course Offerings

Postsecondary Course Requirements

PROGRAMS AND COURSES FOR RETAIL MARKETING

SECONDARY PROGRAM PREREQUISITES	General Marketing (8120) is a prerequisite to Advanced Marketing (8130)
REQUIRED SECONDARY COURSES	General Marketing (8120) Advanced Marketing (8130) Fashion Marketing (8140) Retail Operations Retail Management
POSTSECONDARY PROGRAM PREREQUISITES	Principles of Marketing (MKT 100) Retail Organization and Management (MKT 115) Principles of Selling (MKT 110) Principles of Advertising (MKT 220) Consumer Behavior (MKT 271) MKT Coop (MKT 297)
MAJOR POSTSECONDARY COURSES	Sales Techniques (OTS 100) Advertising and Promotion (OTS 102) Supervision of Personnel (OTS 202) Buying (OTS 208) Fashion Industry (OTS 220) Social Aspects of Clothing (OTS 303) Textiles (OTS 307) Directed Work Experience (OTS 405) Advanced Merchandising (OTS 415) Fashion Design (OTS 422) Fashion Tactics (OTS 481)

RESOURCES

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IDECC LAPS (Math and Display). Columbus, Ohio: The Ohio State University, 1979-1988.

Koeninger, Jimmy G. *Jeffrey's Department Store: A Retailing Simulation.* New York, New York: Gregg-McGraw/Hill Book Company, 1978.

Lewison, Dale M. *Retailing.* 5th ed. New York, New York: Macmillan College Publishing, 1994.

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Samson, Harland E., and Wayne G. Little. *Retail Merchandising.* 11th ed. Cincinnati, Ohio: South-Western Publishing, 1993.

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